

Analyst PoS Advanced Features

Version 3.34

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June 2006

A reduced version of the complete Analyst manual containing:

Customers
Promotions
Loyalty Schemes
Advanced ordering
EDI
Creating Reports
Security
Training

Software by **Chris Wilcock**

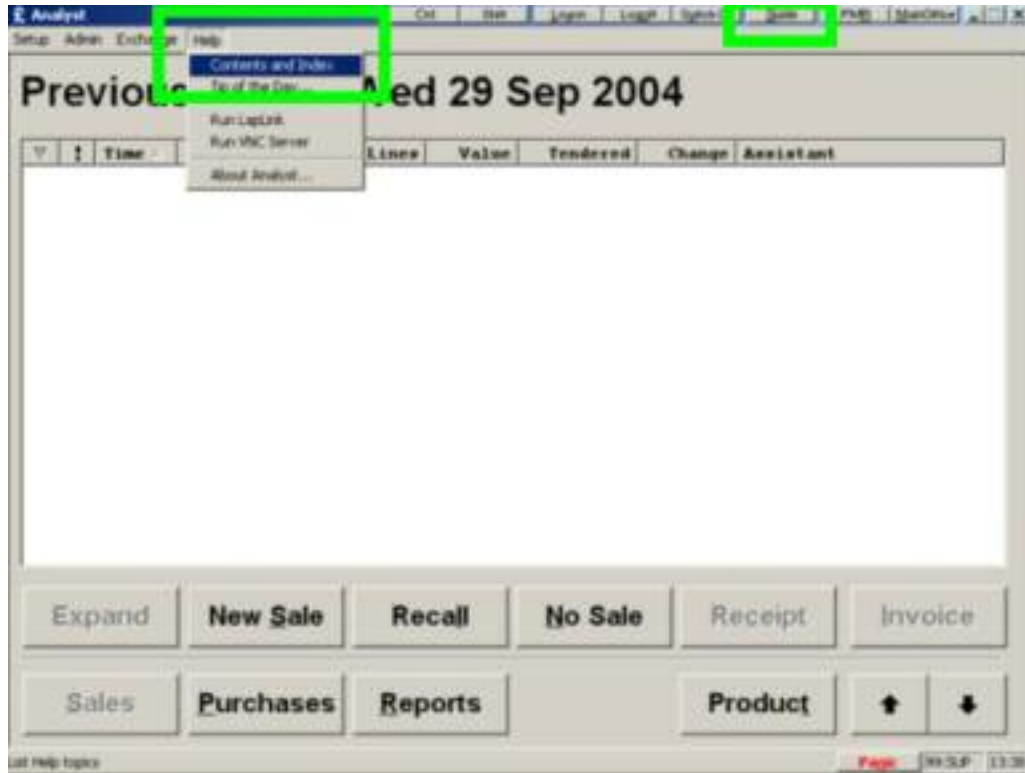
Documentation by **Ian Lynch**

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Introduction

This is an abridged version of the Analyst on-line help which is accessible by clicking the **Guide** button at the top of the Analyst screen or selecting **Help** from the menu bar then **Contents and Index**.



This modules of this printed help file reflects the on-line help for Analyst Version 3.34 released in June 2006. Sections covered are:

- Customers
- Promotions
- Loyalty schemes
- Advanced ordering topics
- EDI
- Creating reports
- Training
- Security

Use the on-line help in conjunction with this manual for an up-to-date answer to your questions or call the CareDesk on 01254 833310 if you require more information.

Some of the images used may reflect an older version of Analyst but the procedure will be essentially the same. The on-line help is continually being updated and changes can be found on the What's New and Previous Releases pages of the on-line version.

If you find any errors, omissions or would like to otherwise comment on either this printed manual or the online help email Ian Lynch at ianl@positive-solutions.co.uk

Customers

Customers can be added to the system to allow them to hold an account with you for which you can print off statements or enrol them in a loyalty scheme.

The customer section can be found by selecting **Setup** then **Customers**. A further menu will appear to do one of the following:

- Search through customers on the system.
- List the customers on the system.
- Create a new customer.

Searching through customers

When prompted with the search dialogue type in the name of the customer to search for in with the surname then forename(s) separated by a space. As much of each part of the name may be entered. John Green can be searched for by typing in GREEN J, GRE JOHN, GR J, etc. As the search term becomes more vague, more records will be matched.



The / (forward slash), # (hash) and = (equals), highlighted in red on the search dialogue are used for advanced searches.

Select the customer to edit from the results list and click **Edit**. The customer editor will open on the Details Tab.



	Name	Address	Postcode	Balance
✓	Green	7 Anticipatory Avenue	2113 9JL	37.30
✓	Green	43 Cross Road	2106 1LN	0.00
✓	Green	43 Fusing Lane	2113 1QH	-0.99
✓	Green	9 Pleasant Avenue	2108 9SL	0.00
✓	Green	26 Happy Avenue	2110 1QA	0.00
✓	Green	88 Hickup Close	2110 2VQ	0.00
✓	Green A.J.B.	17 Cross Street	2114 8HE	0.00
✓	Green C	50 Anticipatory Avenue	2117 1SQ	37.01
✓	Green C	77 Frustrated Close	2112 8TG	23.90
✓	Green H	57 Laughing Close	2115 5DP	-0.01

If you are a PMR or IPS user and you wish to see the patient information for this customer, hold the CTRL button and click **Edit**. This will open the patient editor.

Listing Customers

For complete list of customers select **Setup, Customers** and **List Customers**. The full list of customers is displayed in alphabetical order by surname. This may take a few seconds to appear if you have a large number of customers on file. The order can be changed by clicking in the column headers or the selected column can be jumped down by typing the details in quickly, or alternatively just press the first letter to jump down to that section.

New Customers

New customers can be added by selecting **Setup, Customers** and **New Customer**. Alternatively the **New** button can be selected from the customer list screen. The details tab of the customer editor is opened for details to be completed.

Details Tab

The default tab to be displayed in the customer editor is the details tab which contains the contact details for the customer and an account summary.

By completing the contact details can be completed quickly with the short codes assigned on the Addresses Tab of the system configuration. By completing the details as thoroughly as possible the system develops the postcode lookup facility to help customer entry even faster. At the bottom left select a VAT exemption reason if applicable.

In the top left the account details of the customer are assigned. Set a **Credit limit** if you are to allow the customer to run an account with you. If this limit is exceeded a message will prompt the assistant at the point of sale and a different icon will be displayed in the customer list against this person. Their **balance** is displayed or can be manually altered if required. An **Export ID** can be entered if you intend to export the customer file to another software package and a **Group** can be assigned by typing a new group name into the field or selecting one from the list. This can be used to print statements for a particular group of customers.

The price the customer is charged for their items is set in the section beneath the account setup. By default each person is charged the retail price, but this can be altered to be Cost inc. VAT, Cost Ex-VAT or Free in the **Source** list. These prices are applied when the customer is identified in the sale and a pop up message informs the assistant accordingly.



A **Discount** can be applied to the sale if it is ended to the account rather than paid for by cash or similar. This can be used in addition to the pricing option.

Assign the customer to a Loyalty Scheme by choosing from the **Scheme** list. Their points balance is displayed in the **Points** field and can be changed manually if required. A message can be selected to print in conjunction with the loyalty scheme message to further personalise the greeting.

The History window summarises the date the customer record was created, the date the last statement was printed for them, the total amount placed on the customer account and total loyalty points earned.

Activity Tab

The second tab on the customer editor lists all account activity for the customer.



Unfortunately this is for reference only and the details of the sale cannot be expanded upon. Although the sale date and reference number are given which allows the recall of the details fairly easy.

AutoDebits Tab

This facility allows the Analyst account to take into consideration any long term payment schemes you have setup with your customers. This would be a regular payment into an account to clear an expensive item.



To add a new AutoDebit, click the Add button.

The initial, regular and final payments are setup in the appropriate fields. There is a payment calculator available by clicking the **calculate** button.

By entering the loan amount, APR, number of repayments and when they are to be made, the system will complete the AutoDebit screen as much as possible.

Advanced Customer Searches

As your list of customers grows you may find that just searching for the surname will return a lot of similar names. This can be narrowed down by searching for parts of the forename, postcode, address, patient number or doctor.

When you have the customer search keyboard on screen, you will notice at the bottom right corner there are some buttons in red. These are "magic" buttons or "switches" and tell the system what you are looking for. Depending how you are searching for the patient, you must use the correct switch. These are / (a forward slash) for using the address or postcode, # (a hash) to use the customer card ID and = (an equals sign) to use the doctor's or surgery's filter code. When using the = symbol, you must add **D** or **S** to the start of the filter code so the system knows whether to search through the doctor's or surgery's codes. There is some shorthand written under the buttons to help you remember them.



As an example we shall use the following customer who is a patient of Dr Foster (filter code FOSTER) of Gloucester surgery (filter code GLOU)

Customer Card ID 1705
William S Green
88 Elated Road
ZU9 8LD

We can search for him in the following ways:

Using the names: **Green W, Gre Will, Gre W S**, etc.

Using the address: **Green /88, Gre /Elat**, etc.

Using the Postcode: **Green /ZU9, Gre /8LD**

Using the Card ID: **#1705**

Using the Doctor: **Green =DFoster**

Using the Surgery: **Green =SGlou**

With any of these methods, the speed of identifying the patient is much faster.

New Customers

When setting up new customers on the system there are a number of short cuts in the system to make the job easier.

Family Button

Customers in the same household can be added quickly by using the **Family** button at the bottom left of the customer editor. List the customers and press the **New** button and add the first member of the household normally and when complete press **OK** to return to the customer list.

Press **New** to add the second and then press the **Family** button. The details of the last customer edited are pasted into this record and can be edited accordingly.

Address Short Codes

Even when you must type in the whole address the system can use shortcuts. Details are contained in the Addresses Tab topic.

Printing Statements

Periodically you will want to print an statement of account for your customers to send off for payment. This is from a customer list by pressing the **Statement** button. The Options window will appear.



The options in the top left can be allow the statement to be printed for a certain date range or since the last statements were printed. Click the Last Statement checkbox to remove the tick to activate the start date to specify a range.

The accounts that statements are printed for are specified in the top right. The **All Accounts** option will print a statement for all customers in the previous list. The **Selected Accounts** option is selected by default and will print a statement for all accounts that were highlighted in the customer list. This is usually one, unless you use the CTRL+Click and/or CTRL+SHIFT+Click to multi-select the customers you require statements for. The **Group** option will print only for the selected group regardless of whether or not they were listed in the previous screen.

The **Layout** option allows the format of the statement to be selected. The "PSL Samples" are only to provide you with an idea of what is available and should not be sent out to customers. Your own details and simple logo can be added to these to personalise them. This is done by the CareDesk and can take a few days. Contact them well in advance to have your statement and invoice stationery personalised.

More than one copy of each statement can be printed by changing the number required in the **Copies** field.

Promotions

What is a Promotion?

A promotion in Analyst terms can be any one of four things:

- A future price change
- A price promotion
- A linked sale promotion
- Blanket discount or 'Sale'

Almost any promotion is possible to create using Analyst. However, you must plan and understand the promotion thoroughly before trying to configure Analyst. With a clear aim and understanding of how your promotion will work, it is a fairly straightforward operation to configure Analyst.

Price Promotions

This type of promotion allows the price of a product to be changed but unlike the future price changes, will return to the previous price on a specified date, or when the promotional stock is depleted.

To configure a price promotion for single product, search for the product and expand into the product editor. Click on the Promo Tab and then **Add**.



In the Promotion Type section click the **New Price** option and put the promotional price in the adjacent field. Complete the Promotion Period section with the **Start Date**, then place a tick in the **End Date** option and the end date of the promotion.

Alternatively, a tick can be placed in the **While stocks last** box which will allow only the amount of items specified in the **Promo Stock** field of the Promo tab to be sold at the promotional price. This can be used in conjunction with an end date so the promotion will be active between the promotional dates and while stocks last and will finish at the end date or when all promotional stock have been sold.

Future Price Changes

This is the easiest feature to configure from the promotions dialogue. To configure this for a specific item search for the item in the product editor. Click in the **Promo** tab and click on the **Add** button at the bottom left of the product editor window.

The image shows a 'Promotion Details' dialog box with the following fields and options:

- Comment:** Price Change
- Promotion Type:**
 - New price: 4.99
 - Linked sale
- Promotion Period:**
 - Start date: 01/12/2003
 - End date: 02/11/2003
 - While stocks last
- Linked Sale Item:**
 - Type: This Product
- Qualifying Purchase:**
 - Unit
 - Value
- Based On...:**
 - This unit
 - Percentage discount
 - Value discount
 - Allow multiple price events

Buttons at the bottom: OK, Cancel, Based On...

A comment must be entered for the price change. In the Promotion Type section ensure the dot is in the "New Price" option and type in the new price of the item.

Enter the date the price will change in the "Start Date" of the Promotion Period section. DO NOT enter an end date or click the "while stocks last" box.

The price will automatically change on the morning of the date specified as part of the Daily Initialisation which runs automatically when Analyst is first launched that day.

Link Sale Promotions

Link sale promotions are those which require the sale of an item or combination of items to trigger an offer. These can include be "Buy one get one free" (BOGOF), "3 for 2s", "Buy one get second half price" and so on and are set up on the same promotion screen as the price promotions.

To setup a simple BOGOF on a single item, search for the item and expand into the product editor. Click on the Promo tab and then the **Add** button.

Type in a comment to remind you what the promotion is and click in the **Linked Sale** option of the Promotion Type section.

Optionally enter the date you wish the promotion to run between and/or check the **While stocks last** option in the Promotion Period section.

In the bottom left section the qualifying purchase is specified. This is the trigger level for the promotion. It can be specified in the number of **Units** to be bought, or the **Value** of goods to be bought, before the promotion can be claimed.

If a **Message** is specified in the top right, it will appear across the bottom of the screen when the first item in this promotion has been scanned. This can be used to remind staff to inform customers increase take-up of the promotion.

The Linked Sale Item section specified the benefit of the promotion. For a BOGOF offer, the default type of "This Product" is correct. Other options include "Other Product", "Department", "Product Group" and the User Classes. These are used for different types of offer.

At the bottom of the right side are the details of the offer. The default option is to offer one **free unit**. This can be changed to offer more free units or offer a **percentage discount** or **value discount** on the next item scanned. Select the appropriate option and fill in the number of free items or discount values.

The **Allow multiple bonus awards** option permits customers to receive the offer more than once in each transaction. For example, this BOGOF will become buy two get two free etc. if this option is selected. If not checked, this offer will only be permitted once per transaction.

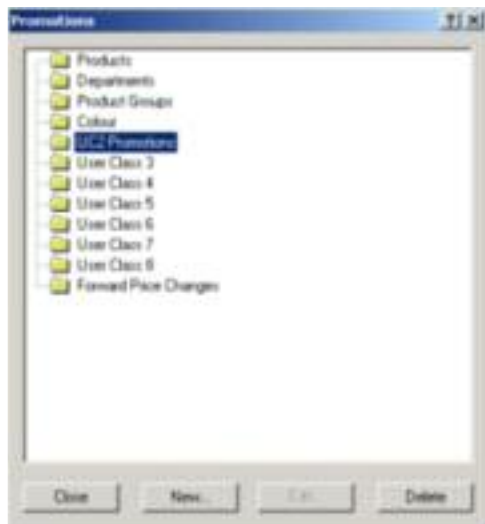
Promoting Ranges

Rather than promoting a single item on a BOGOF or similar offer, a range of items can be placed on offer to allow customers to 'Mix and Match' their items. Also the system can be configured to promote a different range of items to that which triggers the promotion.

In this example an offer shall be placed on Herbal Essence Shampoo 250 ml range "Buy 3 for £3". These are normally priced on this system at £1.39 each.

The first and most important step is to separate the items on promotion from the rest of the product file and have them in their own distinct group to work with. Build a report and template the Herbal Essence shampoos into its own Product group or User Class. I have used a user class.

Once separated in a User class, click on **Setup, Promotions** and then highlight the User Class.



Click on **New**, highlight the user class entry and click **OK**. The promotion editor will now appear. Fill in the Comment field with a suitable name.



The Qualifying units is set to 2. The Linked sale item is liked to the User Class of Herbal Essence Shampoos allowing any third item to have a discount of £1.17 applied effectively selling all 3 bottles for a total of £3.00 (3 x £1.39 = £4.17, £4.17 - £1.17 = £3.00). This allows any combination of 2 items from the range to trigger the promotion and have any third item in the same range at the discounted price.

Cross Range Promotions

An offer similar to the above example can could be configured to offer a second range of products from the first, e.g. "Buy a Herbal Essence shampoo get a conditioner half price". Again The first and most important step is to separate the items on promotion from the rest of the product file and have them in their own distinct groups to work with. Build a report and template the Herbal Essence conditioners into its own Product group or User Class just like the shampoos.

The promotion is then setup on the Herbal Essence Shampoos as follows:



Note the qualifying purchase (of shampoos to be bought) is 1 and linked sale item is set to the conditioner user class and is set to offer a percentage discount of 50%. This will allow any items in the conditioner user class to be sold at half price when accompanying the purchase of an item from the shampoo range.

The "While stocks last" option is not applicable when promoting ranges.

Promoting items of different prices

In the event of promotion offering a free item from a range, for example, "Buy 2 get one free", the item of lowest value will be awarded free.

Blanket Discounts or 'Sales'

A promotional discount can be offered across the board or on specific ranges. This is achieved by setting a qualifying purchase of 1 penny on 'range' promotion. For example, we can offer 20% off all haircare. From **Setup and Promotions** highlight **Departments** and click **New**. Highlight the haircare department and click **OK**.

Type in a suitable comment and set the promotions to be linked sale type. Enter 0.01 in the Qualifying Purchase/Value field.

Now set the Linked Sale Item to the haircare department, percentage discount to 20% and importantly, turn the Multiple Bonus Awards off.

The "While stocks last" option is not applicable applying blanket discounts.

Promotional Stock

The Promo Stock on the Promo Tab of the product editor allow only a certain amount of stock to be issued as part of a promotion, reducing the losses incurred with running popular promotions. Depending on the type of promotion however, the promotional stock can behave in a couple of different ways.

When entering the promotional stock level, the quantity entered here must also be reflected in the total stock level, on the Details tab. For example to promote 50 items of an item with 30 already in stock, the promotional stock is 50, total stock is 80. When the item is sold, regardless of whether the promotion is active or not the promotional stock will both reduce by the amount sold.

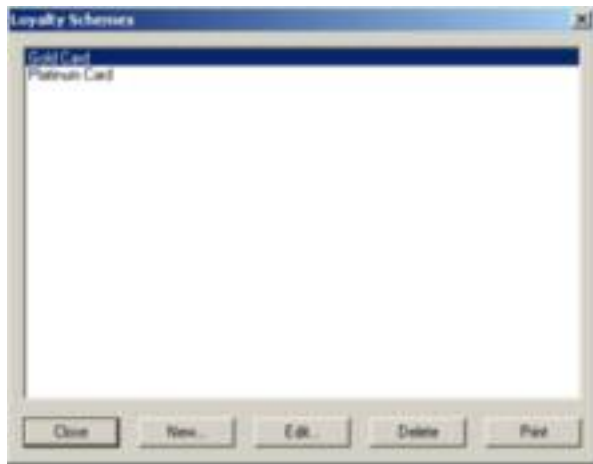
For any items that have promotional stock available at the start of a sale, any promotion triggered in that sale will be honored whether or not the promotional stock runs out. The promotion only expires at the end on the sale that reduces the promotional stock to zero (or below), subsequent promotions will not be triggered.

For each item sold regardless of whether the item has been promoted (a 3 for 2 offer has not been triggered, for example) will reduce the promotional stock.

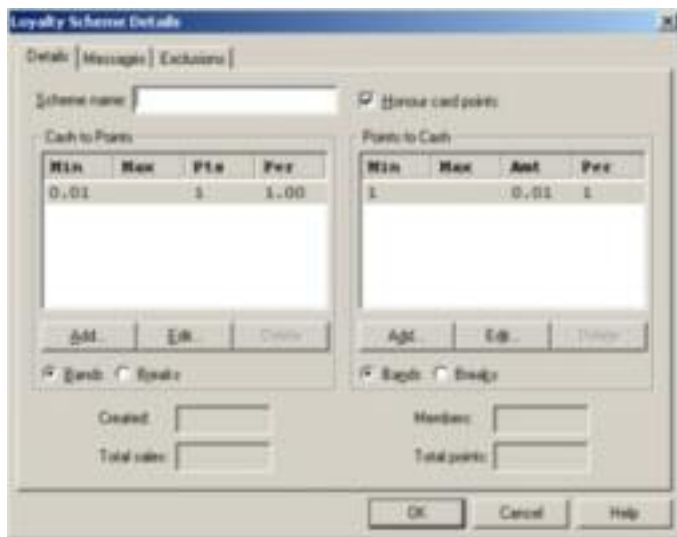
Loyalty Schemes

The loyalty schemes in Analyst work in a similar way to major supermarket loyalty card schemes and allow you to reward the customers you choose with points. These can be accumulated and redeemed against future purchases made by that customer. The rate at which you award points to customers and the value of those points is entirely definable by you.

To access the loyalty scheme section of Analyst select **Setup** from the top left of the screen and then **Loyalty Schemes**



More than one scheme can be defined, each with its own level of benefits to the members of that scheme. Each customer however can only be a member of one scheme at once. To define a new scheme press the **New** button.



There are three tabs which in total define the scheme and a fourth listing the members in the scheme. Common to each of the tabs is the scheme name which must be entered before moving into other fields on to other tab of the editor. The specific contents of these tabs are discussed in the rest of this section.

Details Tab

The details tab of the loyalty scheme editor defines the level at which points are awarded for money spent and redeemed again into money.



Next to the name of the scheme an option exists to **Honour card points** held by members for this scheme. By default this is checked which allows customers to use their points, but if you wish to discontinue the scheme remove the check and customers will be unable to redeem points earned on this scheme.

Cash to Points

By default every complete pound spent (or other base currency unit) will earn one point. This can be modified if required. Click the **Edit** button to change the standard cash to points ratio.



The **Minimum** spend is the amount that must be spent to start earning points. By entering 0.01 here, all purchases will earn points. The number of **Points** earned can be specified **Per** amount spent. A checkbox for **Complete multiples only** enables a complete or partial spend of the earning unit to be spent.

To add an extra band of reward click the **Add** button and enter a new level of minimum spend and points per spend ratio. The below image shows a system configured to earn 1 point per pound up to £10, then 1 point per 75p up to £25 then 1 point per 50p for the rest of the spend.

Min	Max	Pts	Pct
0.01	10.00	1	1.00
10.01	25.00	1	0.75
25.01		1	0.50

A spend of £30 on this scheme will earn 40 points; (£0.01 to £10 @ 1 point per £1 = 10 points) + (£10.01 to £25.00 @ 1 point per 75p = 20 points) + (£25.00 to £30.00 @ 1 point per 50p = 10 points) = 40 points.

Points to Cash

The conversion back from points to cash occurs when the customer is paying for good and chooses to redeem their loyalty points. The cash value of these can be varied from the default setting of 1 point is 0.01 and bands can be introduced to change their value when redeemed in bulk.

The **Minimum points paid** field provides the baseline for a new band of redemption value. The **Value** and **Per number** of points determine the new redemption value.

Min	Max	Amt	Pct
1	999	0.01	1
1000		0.01	2

In the example above, if more than 1000 points are redeemed in one transaction the points over the first 1000 which are redeemed at 0.01 per point will be redeemed at half the rate 0.01 per 2 points. The redemption therefore of 1500 points would be worth £12.50; (1000 x £0.01=£10.00) + (500 x (£0.01 / 2) = £2.50) = £12.50.

Bands and Breaks

These determine what happens when a new tier is reached. When the tiers are bands, only the proportion of spend over the threshold is calculated at the new rate, but with breaks, once a threshold has been reached the whole amount is calculated at the new rate. The calculations above are for banded tiers. If they were breaks a spend of £30.00 would earn 60 points (£30.00 @ 1 point per £0.50 = £30.00 / £0.50 = 60 points) and the redemption of 1500 points would be worth £7.50 (when over 1000 points, 2 points are worth £0.01, therefore (1500 points / 2) x £0.01 = £7.50)

By default the tiers are setup as bands.

Scheme Information

At the bottom of the window some information is displayed about the performance of this scheme.

Created:	25/11/03	Members:	742
Total sales:	4582.12	Total points:	5236

These panels display the date the scheme was created, the number of customers that are assigned to the scheme, the total number of sales made to those customers and eligible to earn points and finally the actual number of points earned by members of this scheme.

Messages Tab

Each scheme provides the facility to print a personalised message on the receipt and/or thermochromic card of scheme members. This is specified on the Messages tab. There are two areas available for printing on the card and receipt which are termed Leading and Trailing messages. They will print in roughly the same part of the card or receipt, but the leading message lies above the trailing. The reason for the two areas is to allow slightly different messages to appear on the card than the receipt where both are used.

The screenshot shows the 'Loyalty Scheme Details' window with the 'Messages' tab selected. The 'Scheme name' is 'Loyalty Card'. The 'Leading message' field contains: 'Thankyou \$N
This sale has earned \$E p
in your account. You are i
fl points which can be re
for \$V during any sale.' The 'Trailing message' field contains: 'Have you tried our new Ch
Gold Card members earn 10\$
with each visit. Ask in an
appointment with Bev.' Below the messages are checkboxes for 'Receipt' and 'Loyalty card'. At the bottom, a list of special character sequences is provided: \$N Customer name, \$C Company name, \$A Full address, \$P Post code, \$D Old loyalty points, \$E Extra loyalty points, \$L New loyalty points, \$V Points value, \$R Points redeemed, \$B Account balance, \$D Current date, \$T Current time.

Specify each message in the appropriate box by typing the text in. Be careful the width doesn't exceed the width of the receipt roll or card print area. This is only really achievable through trial and error, but is centrally justified on the receipt so under-filling a line doesn't look bad. Messages are typically used to inform the customer about their account and to let them know about other products, services and special offers are available.

Special Character Usage

Messages can be personalised by using details from the customer account. These are listed at the bottom of the window and can be used by either typing the special characters in or using the button at the bottom left of the messages fields to select them

from a list. The special characters, all prefixed by a dollar symbol, are substituted at the time of sale.

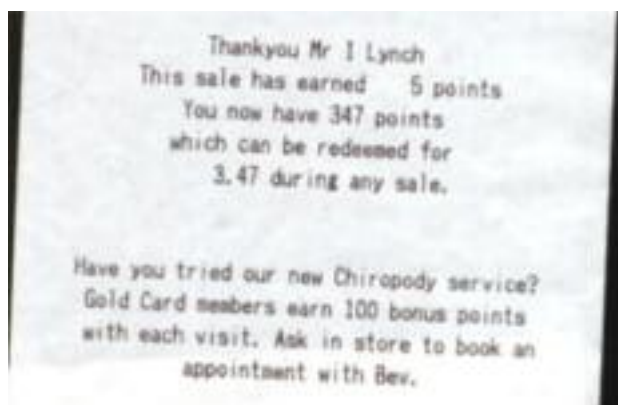
\$N	Customer Name	The name of the customer identified on the sale
\$C	Company Name	The name of the company of the customer identified in the sale
\$A	Full Address	The address of the customer identified on the sale
\$P	Post Code	The Post Code of the customer identified on the sale
\$O	Old Loyalty Points	The customer's balance of points before the sale commenced
\$E	Extra Loyalty Points	The number of points earned in this sale
\$N	New Loyalty Points	The new balance of customer's loyalty points
\$V	Points Value	The cash value of points if they were all redeemed at once
\$R	Points Redeemed	The number points redeemed in this sale
\$B	Account Balance	The cash balance of the customer's account
\$D	Current Date	The date the sale was made
\$T	Current Time	The time the sale was made

For example the messages above are...

Leading Message: Thankyou \$N. This sale has earned \$E points. You now have \$L points which can be redeemed for \$V during any sale.

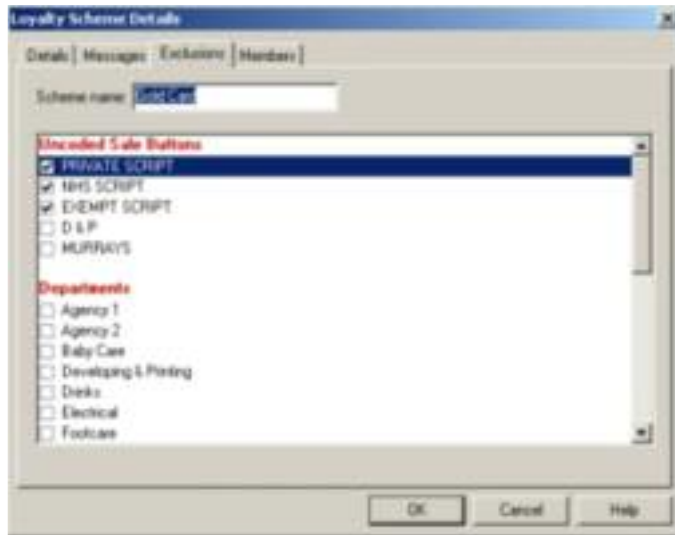
Trailing Message: Have you tried our new Chiropody service? Gold Card members earn 100 bonus points with each visit. Ask in store to book an appointment with Bev.

...and appears as this.



Exclusions Tab

Customers can be prevented from earning points on certain items or ranges of items. NHS prescription fees, stamps, phone cards and similar are all good examples as the profit does not warrant awarding points.



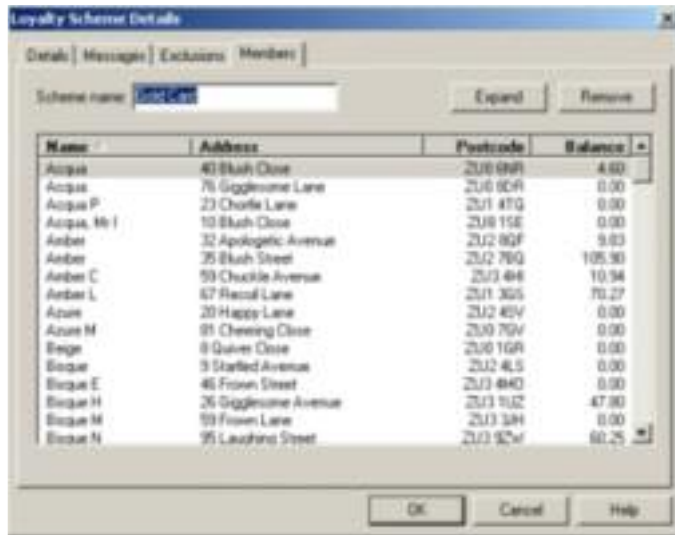
A list of uncoded buttons and departments are displayed in the main pane. Any which have a tick placed next to them are excluded from the scheme and do not earn points.



The exclusion from schemes can also be performed on a per-button basis in the Uncoded Button setup.

Members Tab

This tab details all of the members of a scheme. The record of each customer can be expanded for more detail, or can be removed from the scheme using the **Expand** and **Remove** buttons whilst highlighting the intended record.



Columns can be sorted by clicking on the column headers.

Exceptions

Products can be defined to award a specific amount of points for a certain amount of time rather than being allowed to earn points based on the retail price. By using this products can be excluded from the scheme or can be placed on special offer.

Find the product to work with and expand into the Classes tab of the Product Editor.



Press the **Add** button to add a new Exception.



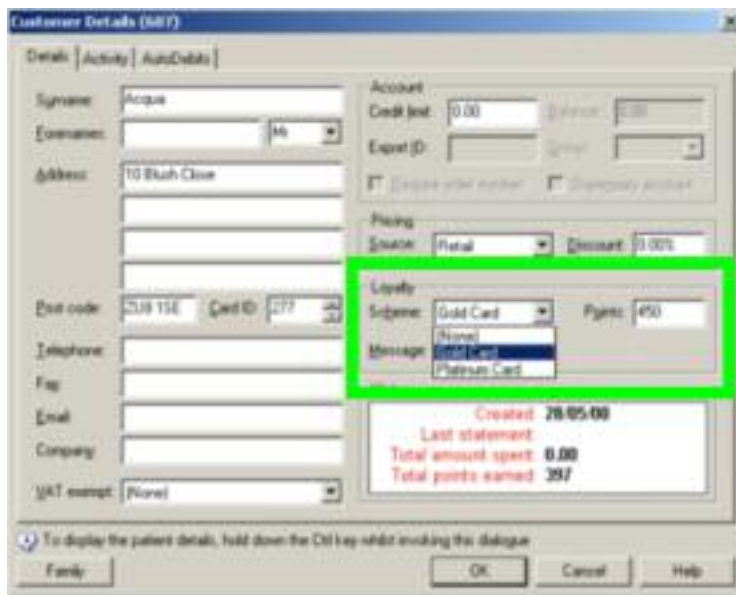
Select the scheme if more than one is setup and enter the points earned by the sale. Enter **0** (zero) to prevent the item earning any points.

By default the exception is perpetual, but it can be restricted to operate within a certain date range by placing a tick in the **Time-limited promotion** box and selecting the date range.

Only one exception can be configured per scheme and an exception will not operate over more than the specified scheme. If more than one scheme is configured on your system an exception for each scheme must be configured.

Defining and Identifying Customers

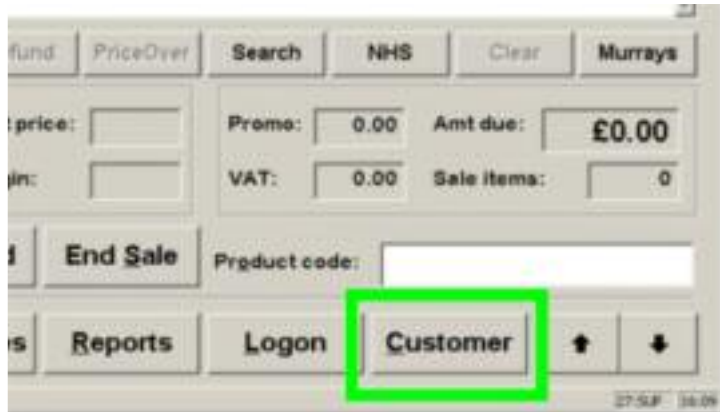
Once a loyalty scheme has been defined on the system, customers must be associated to the scheme. This is done in the customer record. Select your customer and expand into their details.



Select which loyalty scheme they are to become a member of from the drop down box on the right. The number of points currently 'owned' by the customer is displayed. This can be modified if necessary. The **Message** option allows an additional message to be printed on the receipt or card of each sale made by the customer. This can differ from the message setup within the loyalty scheme.

During a Sale

During the normal course of a sale, the only thing that is required is that the customer is identified. This allows Analyst to apply the correct level of points and messages from the scheme they are a member of. This is done by using the **Customer** button on the sales screen and searching for them, or scanning their card. This can be done at any time during the sale.



Redeeming Points

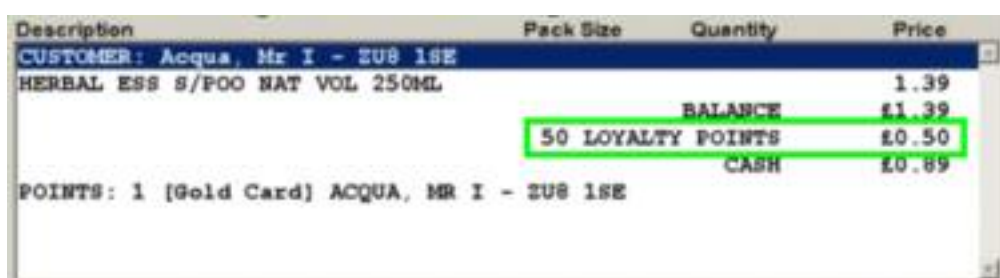
Points earned by customers can be redeemed as part or complete payment for other goods. This is done as part of a normal sale. When all their items have been scanned, press the **End Sale** button and then **Points**.



Enter the number of points to be redeemed. The total number of points the customer has is displayed by default.



The points are then redeemed at the rate specified by the scheme and deducted from the sale. A payment mile of "Points" is inserted on the receipt.



Loyalty Cards

Customer identification can be sped up by the use of loyalty cards. These are supplied as an optional extra to the system. Two systems are available:

Barcoded Customer Cards

These durable rigid plastic cards are printed to order and contain a barcode on one side. This is used to uniquely identify the customer during a sale simply by scanning the barcode. The remaining space on the card is available for address details and logos of your store. The card can be printed double sided if required, but this increases the cost.



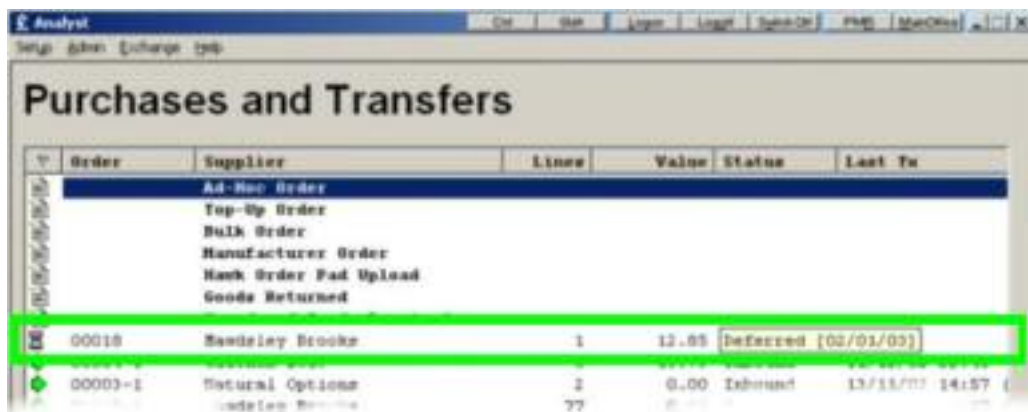
Call the sales team on 01254 833300 for details and prices of the barcoded loyalty cards.

Deferred Ordering

Some items may only be required for individual customers. Consequently, there is no need to immediately replace them when they have been used, but the item will need re-ordering at a later date, in time for the customer's next visit. Analyst includes a Deferred Ordering facility, which allows orders to be compiled and stored, ready for transmission on a specific date. As described below, Analyst includes facilities for deferring entire orders, and for selectively deferring one or more lines of an existing order.

Deferring an Order for Future Transmission

An order that has not yet been sent can be deferred for transmission at a later date. To do this, highlight the order in question and press the **Send** button followed by the **Defer** button. Analyst displays a calendar dialogue to allow you to select the date on which the order should be transmitted. Once an order has been deferred, Analyst displays an hourglass icon against it in the list of orders. The **Status** column indicates the date on which the order will be ready for transmission. An order that has been deferred can be returned to normal by pressing the **Today** button in the calendar dialogue.



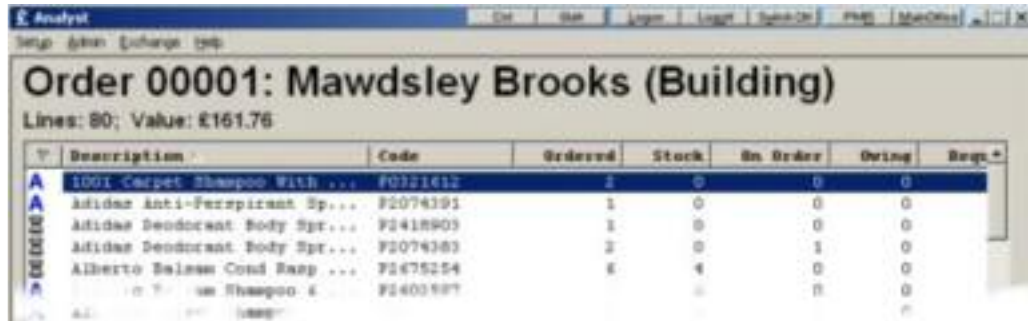
Order	Supplier	Lines	Value	Status	Last Tx
Ad-Hoc Order					
Top-Up Order					
Bulk Order					
Manufacturer Order					
Hawk Order Pad Upload					
Goods Returned					
00018	Bendley Brooke	1	12.05	Deferred [02/01/03]	
00003-1	Natural Options	2	0.00	Inbound	13/11/07 14:57
	London Brooke	77			

Deferring Lines in an Existing Order

One or more lines in an existing order can be deferred for transmission to a later date. When the order is saved, Analyst removes the deferred lines from the order, and creates a new order for the same supplier, deferred for transmission on the appropriate date. If there is already a deferred order for the same supplier and date, Analyst will add the deferred lines to that order, rather than creating a new order. If multiple lines in the order are deferred to various different dates, then Analyst will create or amend several orders, as necessary.

Lines may be deferred individually using the Order Quantity dialogue, which now includes a **Defer ordering until** date control in its lower right corner. When a line has been deferred for ordering, Analyst displays an hourglass icon against it in the list of products on the order. A line that has been deferred can be returned to normal by pressing the **Quantity** button and selecting a date on or before the current date in the **Defer ordering until** date control.

Multiple lines may be deferred collectively by selecting the additional lines with the **Ctrl** key pressed, then clicking the **Tags** button followed by the **Defer** button. Analyst displays a calendar dialogue to allow you to specify the date on which the lines should be transmitted. When the order is saved, Analyst creates or amends additional orders for the deferred lines, as described above.



T	Description	Code	Ordered	Stock	On Order	Order	Req. *
A	1001 Carpet Shampoo With ...	F0321412	2	0	0	0	
A	Adidas Anti-Perpirant Sp...	F2074391	1	0	0	0	
A	Adidas Deodorant Body Spr...	F2418903	1	0	0	0	
A	Adidas Deodorant Body Spr...	F2074383	2	0	1	0	
A	Alberto Salinas Coud Rasp ...	F2475254	5	4	0	0	
A	... Shampoo 4	F2400197			1	0	

Deferring at the Point of Ordering

Lines can be deferred for ordering as soon as they are added to the order. This is especially useful when Analyst has been configured with the **Order when used** re-order method for certain products. When Analyst displays the Order Quantity dialogue, simply select the appropriate date in the **Defer ordering until** date control. Analyst will then create a deferred order for the products, or amend an existing deferred order if appropriate.



Tagging Lines Within an Order

Lines of an order can be highlighted and manipulated in a similar way to tagging in a report, but the method of tagging in an order is different.

The method of highlighting line within an order is by using the typical combination of CTRL, Shift and mouse clicks. Touch-screen operation is slightly different and uses the 'sticky buttons' at the top of the screen and screen presses.

The line highlighted in blue is selected. When only one line is selected press the **Action** button at the bottom left to access other functions. To highlight other lines, press and hold the CTRL button whilst clicking extra lines. All previous lines will remain highlighted with this method. To select a range of items highlight the item at the top of the range, press and hold the SHIFT button and click the item at the bottom of the range. All items between and including the top and bottom items have been selected.

To select a range of items in addition to others which have already been highlighted, select the range as above, but press and hold CTRL+SHIFT button to select the range and preserve the previous selection.

On a touch screen select lines by touching the screens and use the CTRL and SHIFT buttons in the top bar, which once pressed stay down allowing you to press the screen to achieve the CTRL+Touch, SHIFT+Touch and CTRL+SHIFT+Touch requires to make your selections before pressing the buttons again to 'release' them.

With more than one line selected, the **Action** button transforms into a **Tags** button, under either of which the following options are found. The number of lines selected and state of the order will influence which of these options are available or are inactive.



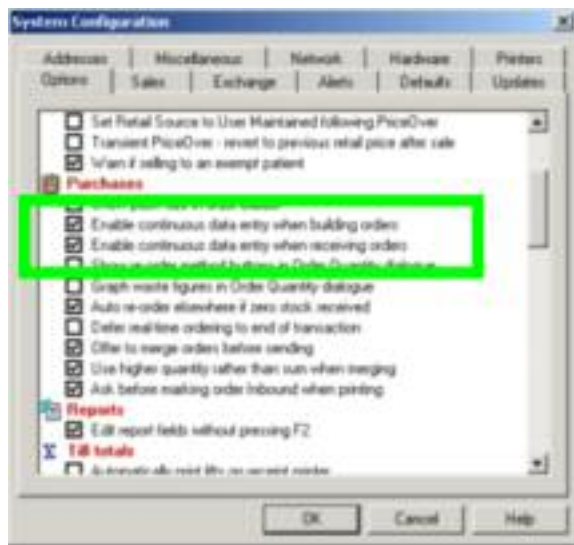
- Expand into the product editor for the select record.
- Enter the stock level of the selected record.
- Remove the selected record(s) from the order.
- Template the selected record(s).
- Transfer the selected record(s) to another order.
- Print product labels for the selected record(s).
- Enter the singles/unit price for the selected record.
- Enter the case price for the selected record.
- Enter the retail price for the selected record.
- Mark the selected record(s) as still 'To Follow' from the supplier.
- Mark the selected record(s) to 'Re-order elsewhere/anywhere.'

Continuous Data Entry

To help you check through the order quantities of an entire order quickly, there is an option in the system configuration to allow continuous data entry when either or both reviewing built orders and receiving orders.

When this option is turned on the order/received quantity dialogue will reappear for each item in the order list as each quantity is checked. The quantity in the dialogue defaults to whatever is already in the order so you can move through the order and confirm the quantity just by pressing **Enter**.

To view or change this option, log on as the system supervisor then select **Admin** and **System Configuration**. In the Purchases section there are two options.

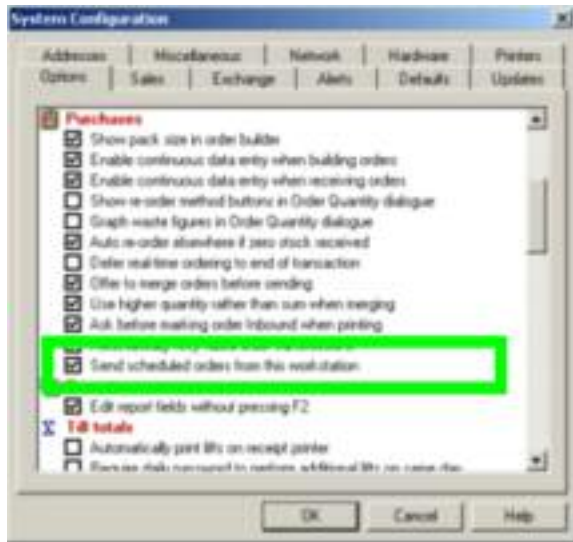


Click **OK** when complete.

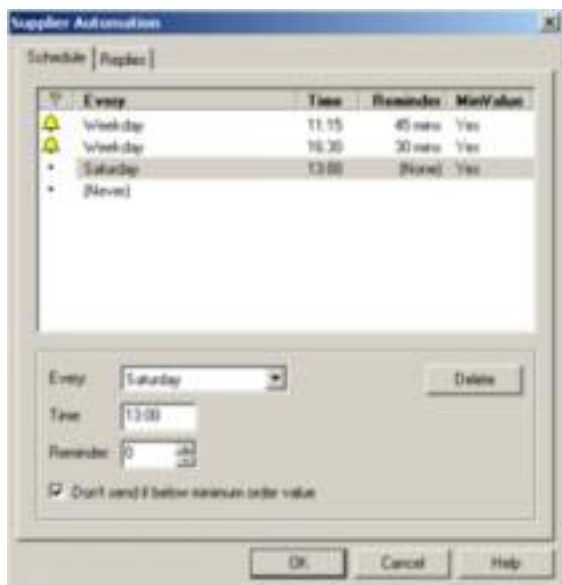
Scheduled Order Transmission

Orders can be set to automatically transmit at a specified time on a regular basis. This is configured on a per-supplier basis in the supplier setup.

A terminal must also be designated as the sender of the orders. This is specified in the system configuration of the designated terminal. From **Admin** select the **System Configuration** and scroll down to the **Purchases** section. Check the final option "Send scheduled orders from this workstation". This can only be checked on one terminal in the system.



To configure orders to a supplier to be transmitted automatically select **Setup, Product Groupings, Suppliers** then highlight the supplier of your choice and click **Edit** to open the supplier editor. Click on the **Auto** button on the right of the window to display the supplier automation dialogue.



The pane initially displays a single entry of "Never". Highlight this and amend the details in the bottom half of the window, Settings can be chosen for each day (every day),

weekday (Monday to Friday) or the individual days. For whichever option is selected enter a **Time** to be transmitted and if you would like a **Reminder** to build/check the order enter how long before the order is due to be sent you would like to be reminded. Enter 0 (zero) in this field if you do not want a reminder.

Orders can be prevented from being sent if they do not reach the minimum order quantity entered on the supplier setup by placing a tick in the **Don't send if below minimum order value** box.

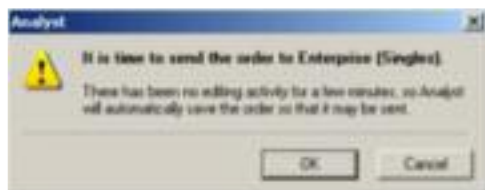
At the time requested, a message will appear warning of the imminent transmission and for you to check the order. When the time for the scheduled transmission arrives, the order will be sent by modem. If any problems occur the order will be retried up to 4 times.



If a user is still editing the order at the transmission time a message will appear requesting that they complete the order to allow it to be sent.



If the order has been accidentally left open on a terminal which is not currently manned, the system will automatically save, close and send the order if no editing activity is detected for 3 minutes. A message appears to warn that this is about to happen in case there is a reason it should not be sent.

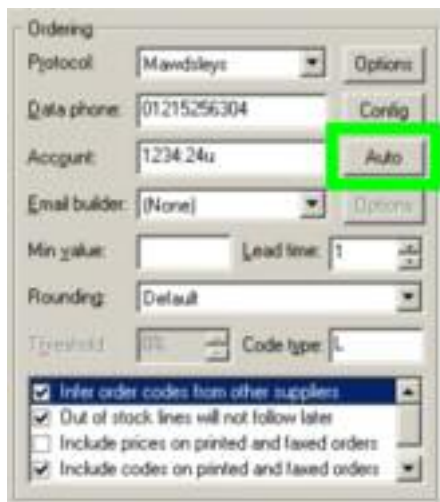


The order is merged with any other orders for the same supplier which are built and waiting to be sent and is transmitted, unless the predicted combined order value is still below the minimum order value for the supplier, in which case they are neither sent nor merged.

Automated Replies Processing

Electronic replies sent from certain suppliers can be automatically processed according to user definable rules on a per supplier basis.

Only replies from Mawdsleys, Unichem and suppliers using the Cypher-XC protocol (Phoenix is one of these) can be processed, but others will follow in future releases. To define the rules to follow, select **Setup, Product Groupings, and Suppliers**. Highlight the supplier you wish to configure and press the **Edit** button. Press the **Auto** button next to the Account number field and click on the **Replies** tab.







The conditions that are returned in the replies from the supplier are listed in the pane on the top of the window. These can vary from each supplier and listed in the table below.



Reply	Cypher-XC	Unichem	Mawdsleys
Manufacturer Out of Stock	X	X	X
Not Stocked At Current Location	X		
Not Stocked by Supplier	X	X	X
Product Deleted	X		
Product Discontinued	X		X
Restricted Item	X		
Stock Not Available	X	X	
Stock To Follow	X		
Supplier Out of Stock	X	X	X

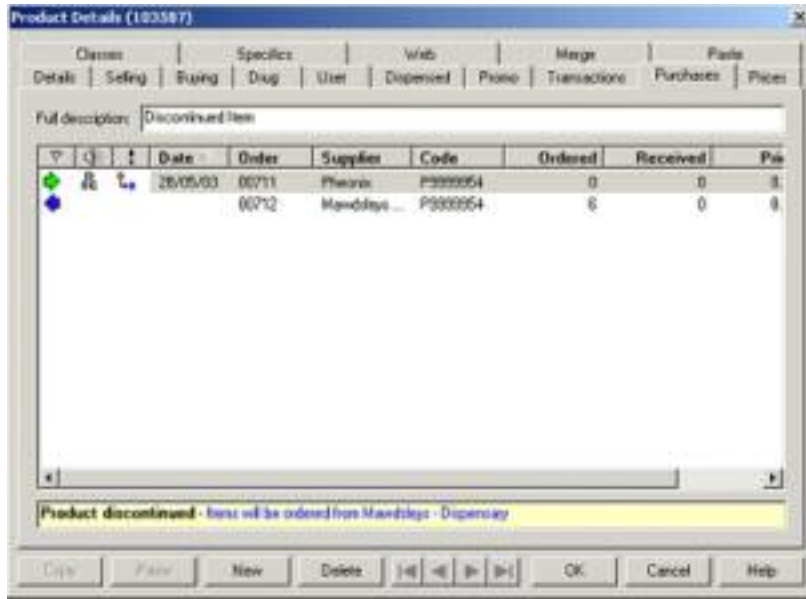
Each of the actions in the left column, where supported by the supplier (represented by X), can have any of the following action:

▪	Take no action	The order for the item will be discarded
	Amend order details	Manually determine what to do with the item
	Re-order in 'x' hours	Re-orders the item in the specified time from the same supplier
	Re-order in 'x' days	Re-orders the item in the specified time from the same supplier
	Transfer to alternative supplier	The order for the item is transferred to the requested supplier

To assign a reply to an action, highlight the reply status in the left pane and select the action of the right. For the re-order and transfer options, the adjacent field opens to allow you to enter the appropriate information. For certain replies, certain actions are not available: if the item is not stocked by a supplier the option to re-from them is disabled.

Once the rule for each of the suppliers have been established, the replies will be processed accordingly without any further intervention from you.

Any products that are affected by these replies have notes added to their product details which are viewable on the purchases tab of the product editor and when reviewing the order.



Two new columns have been added to reflect the nature of the reply and the action taken. A more complete explanation is displayed in the new information pane at the bottom of the editor.

Re-Ordering Methods

The re-order method of an item determines when and how the item will be suggested for order from the associated daily or bulk supplier.

Here are the six re-ordering methods and an explanation of each.

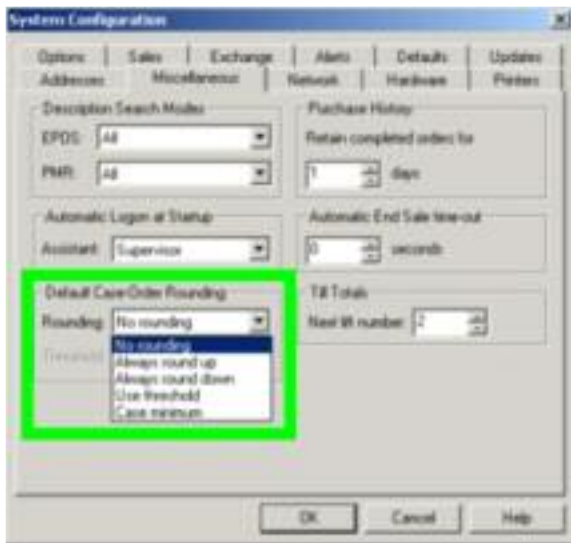
Manual	This method excludes the product from the suggested order for the product's associated daily supplier.
Demand Replace	When a suggested order is built, an appropriate quantity is ordered to exactly replace the number of units sold since the last time the product was ordered.
Demand Auto	When a suggested order is built, an appropriate quantity is ordered based on the product's previous and projected sales, current and minimum stock levels and current on-order quantity.
Background Replace	Similar to Demand Replace, except that the product is automatically placed on the first available order for the product's associated daily supplier each time it is sold. If you are running Analyst PMR, the same thing happens each time the product is dispensed. An order is available if it has not been sent, is not in the process of being sent, and is not currently being edited by another assistant.
Background Auto	Similar to Demand Auto, except that the product is automatically placed on the first available order for the product's associated daily supplier each time it is sold. The order quantity will be calculated based on the just-completed sale, along with the other parameters that affect auto-ordering. If you are running Analyst PMR, the same thing happens each time the product is dispensed.
When Used	Each time the product is sold, a dialogue appears prompting for the quantity to be ordered. This is effectively the same as pressing the Action button followed by the Order button each time the product is scanned. As before, the same thing happens each time the product is dispensed through Analyst PMR.

Case Order Rounding

This option provides the facility to round singles orders to obtain case discounts from suppliers and avoid repeated orders for ones and twos of popular items.

Two options exist in Analyst. A system setting which will affect the case calculations in your entire system and a supplier setting which, if set, will over-ride the system setting for that particular supplier.

The system setting can be found in **Admin, System Configuration** and on the **Miscellaneous** tab.



The options are:

No rounding	No rounding is performed unless the item is only available in cases, where the order qty will be rounded up to the next full case.
Always round up	Rounds the suggested order qty up to the next full case multiple.
Always round down	Rounds the suggested order qty down to the next full case multiple.
Use threshold	If the suggested order qty is equal to or greater than the threshold quantity, the order qty will be rounded up to the next full case multiple. If it is less than the threshold quantity, the order qty will be rounded down to the next full case multiple.
Case minimum (excess singles)	If any suggested order qty for items normally ordered in singles is not greater than a full case, the order quantity will be rounded up to a full case. Suggested order quantities larger than a case are not affected.

The option can be overridden on a per-supplier basis by selecting the rounding option in the supplier setup. From the **Setup** menu select **Product Groupings, Supplier**, highlight the supplier you wish to modify and press **Edit**.

The screenshot shows a 'Supplier Details' dialog box with the following fields:

- Supplier:** Name: Mawbley Books (Engles); Address: Number Three, South Langworthy Road, Lifford; Post code: W50 3PW; Contact: ; Telephone: 0161 742 3000; Fax: ;
- Ordering:** Protocol: Mawbley; Date phone: 0161 736 2524; Account: 000013u; Local supplier: (None); Min. value: ; Lead time: ; **Rounding:** Default (highlighted in green); No rounding; Round up to next full case; Round down to full case; Use threshold; Use threshold to round up/down; Use minimum order quantity;
- EDI Data Exchange:** Protocol: (None); Date phone: ; Account: ;
- Data Input:** Filter: (None); PSL source: Mawbley;

By selecting **Default**, the orders built for this supplier will adopt the system settings. By selecting any of the other options, the Analyst will suggest order quantities for this supplier in accordance with the setting in this screen, not the system setting.

EDI Module

What is EDI?

EDI is an Electronic Data Interface or Interchange between two computers via a modem, a network connection or even over the internet. EDI differs from a normal modem transmission as both systems are more aware of each other during the exchange and can therefore perform more complicated transmissions than simply dropping off a text file for processing in the near future.

Analyst can only use the EDI system with suppliers who we can work closely with to discuss the requirements and exact procedures. Regrettably this is only available with a few of them. Speak to the CareDesk to ask if your suppliers are compatible. Not all suppliers will be able to offer the level of information described in this guide.

Currently Phoenix supply delivery notes which can be automatically processed; Mawdsleys can provide both delivery notes and invoices electronically. Groups who use Positive Solution's Head Office or Main Office can receive delivery notes.

The Process

The theory is as follows:

1. Orders are built and sent as normal.
2. The supplier will receive and process the order against their stock control and picking systems.
3. The completed details will be passed to a separate system which will generate the delivery notes and/or invoices.
4. After a while your system will contact the system holding the delivery notes and retrieve them.
5. When your goods arrive, you can compare the amounts to delivery note you have already downloaded.
6. When confirmed or modified the delivery note is accepted to update your stock levels.
7. Any items not delivered can be set to order from either another supplier or the same supplier in a set number of hours.

Notes:

Step 4 (the re-dial/re-connection) can be configured to either connect automatically or to prompt you to connect manually when you attempt to review the inbound order.

Step 6 (accepting the order) can be set to automatically occur. The system can obviously not check the actual amount of each item received through the door.

Supplier Setup

In order for your EDI to work correctly the supplier you are sending to will need to be configured correctly. As more information is received from Mawdsleys the example below will be for the Mawdsleys' setup. The Phoenix setup and other suppliers as they become available will be setup in a very similar way.

From **Setup, Product Groupings and Suppliers** select Mawdsleys and press **Edit**. The EDI details are on the **Settings** tab.



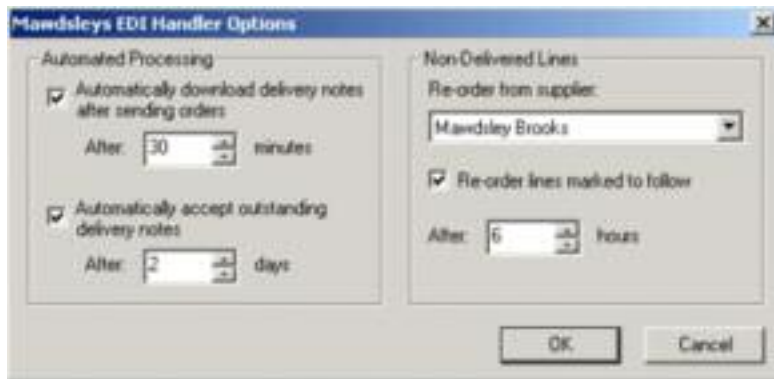
Your normal transmission settings in the top right are unaffected and are used to send the order as normal to the supplier. The settings that are highlighted in the image above will need to be configured. The Protocol will usually be the name of your supplier. The phone number will differ from the data phone number in the top right as the system will need to dial into the server which will despatch your delivery notes and invoices to you. For Mawdsleys this number is 0161 737 3096. Your account number also will probably differ as a password may be included for extra security to ensure no-one else can collect your delivery notes and/or invoices.

IP Connections

Head Office and Main Office systems can be contacted securely through the internet saving both time and money. In the protocol box select the system type running at the supplier and select **Network Connection**. The field which was for the telephone number now changes to accept the IP address of the host system. You may need to contact the Network Administrator at your head office or the CareDesk for the correct address. The rest of the options remain the same as dialling systems.

Automated Processing

Press the **Options** button to see the auto re-dial/re-connect and re-order options.



In the Automated Processing section on the left there are two options. The delivery notes can be automatically downloaded after sending an order. The supplier's system will typically need 10-15 minutes to process your order and generate the delivery notes for you. Just in case the system is unusually busy it is sensible to set this option to re-dial out 20-30 minutes after sending a order. If not set, you will be prompted to manually dial out to collect your delivery notes when you try and view the inbound order. Head Office and Main Office customers rely on more manual techniques for generating delivery notes so they it may be more suitable to select the option to connect to the host system at a set time each day to check for outstanding delivery notes. (this option is not displayed above)

Delivery notes can automatically be processed after a set amount of time. It is advisable to always check the delivery note matches the actual goods received, review the electronic delivery note and accept it yourself. If, however, you prefer to save time or would like to ensure your stock is booked in when you are on holiday or a locum is in charge etc, this can be set to automatically accept your orders in based upon the quantities contained in the delivery note.

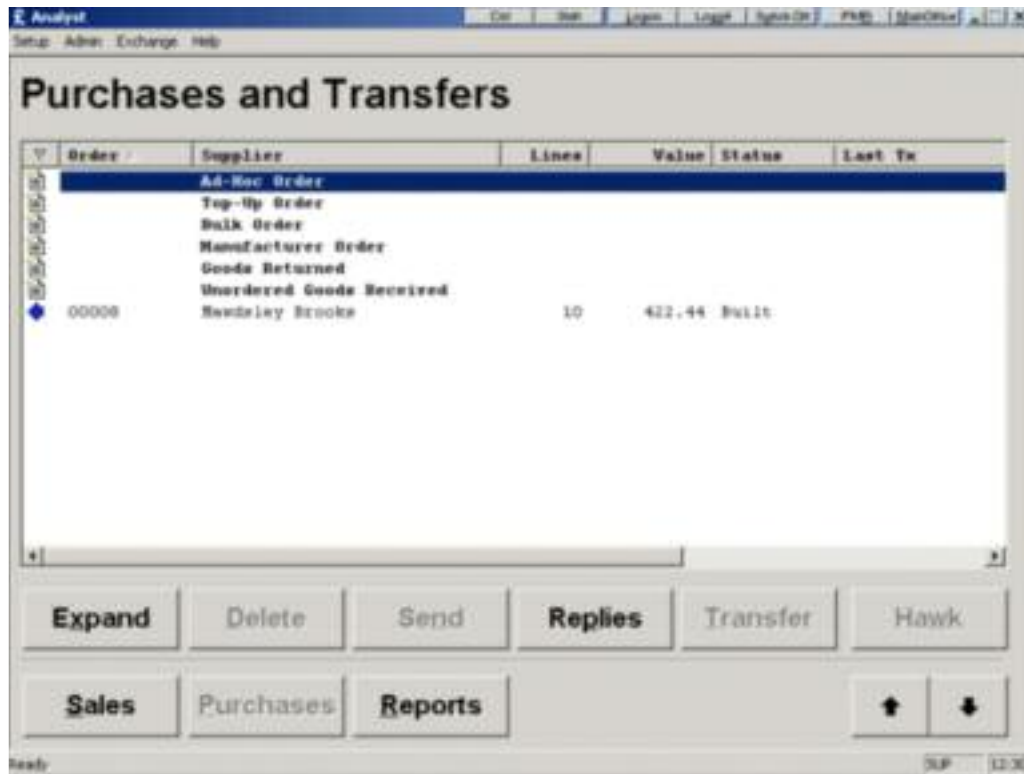
If this option is enabled this should be set to either accept on the day of delivery so orders are not inbound for too long, or several more days if you want to use it as a safety net in case inbound orders are missed.

On the right of the options windows you can set an automatic re-order of non-delivered items. This can be to any supplier in the system and is selected from the combo box. The system will create a 'built' order on the purchases screen for the required items from the specified supplier. If a re-order time is specified the system will create a deferred order on the purchases screen and will it behave as a deferred order.

This automatic re-ordering can be extended to items which were marked "To Follow" (with the green arrow) by checking the box.

Sending Built Orders

As explained orders are built and sent in the normal way.



Highlight the order and press **Send** and **Modem** to transmit the order to the supplier. If this is an EDI supplier and you have set the automatic re-dial delay, the timer will start counting down from now. Replies are sent as normal from the supplier and can be viewed by pressing the **Replies** button.

The replies are displayed with a loudspeaker file next to them to distinguish them from delivery notes from previous orders, which have a clipboard icon.

Automatic Re-Connect

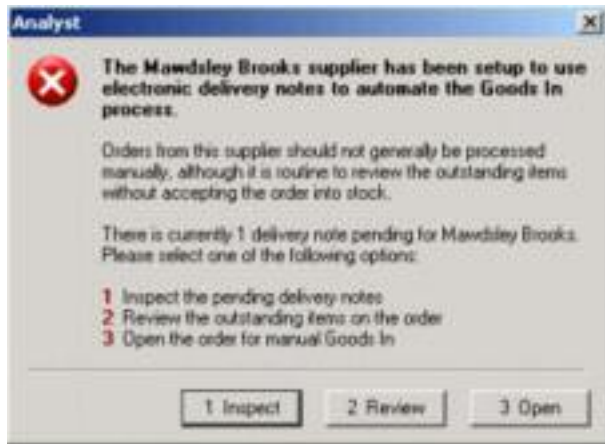
After the time delay specified in the supplier configuration the system will re-connect to the supplier, but using the EDI number or IP address, not the main ordering number.

By now the supplier's system will have processed the order and have generated the delivery note and invoices ready for you to collect. When contact is established, they are downloaded to your system.

If the system could not establish contact it will try again after a few minutes. If you notice this happening and you use your modem to connect, make sure the phone line the system is trying to use is not in use already.

When the delivery notes have been downloaded, press the **Replies** button to view the delivery note. They are listed with a clipboard icon next to them to distinguish them from replies.

Or if you try and expand an order you have downloaded a delivery note for you will be given the following options.



1. Open the Replies screen and highlight the delivery note for this order so you can expand and review the contents of it.

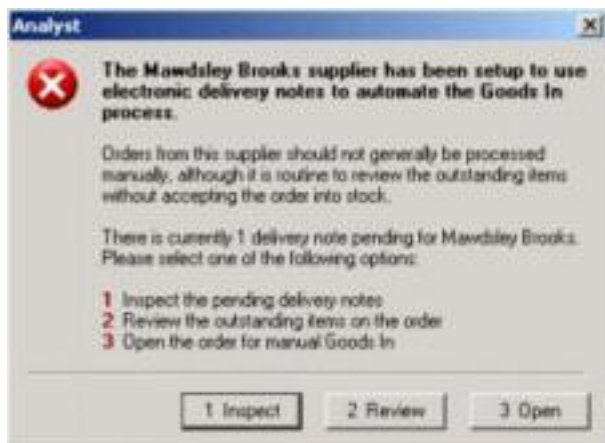
2. Ignore the delivery note for the moment and review the order you sent in a 'read only' mode. No changes can be made.

3. Ignore the delivery note for the moment and review the order you sent in full editable mode.

NOTE: any changes made in this mode will over-ride any information contained within the delivery note.

Manual Re-Dial

If the system is not set to automatically retrieve the delivery notes from the supplier you will be prompted to connect to the host system for it when you expand into the inbound order.



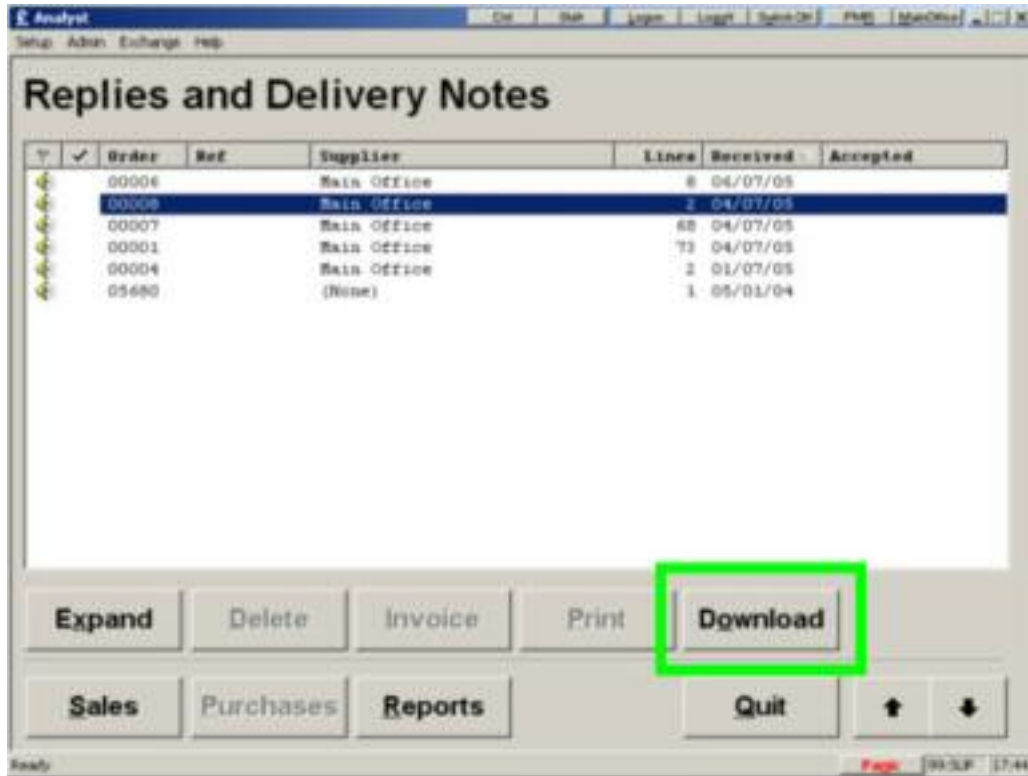
1. Connect to the supplier to retrieve pending delivery notes. When downloaded the replies section will open displaying the delivery note for this order.

2. Ignore the delivery note for the moment and review the order you sent in a 'read only' mode. No changes can be made.

3. Ignore the delivery note for the moment and review the order you sent in full editable mode.

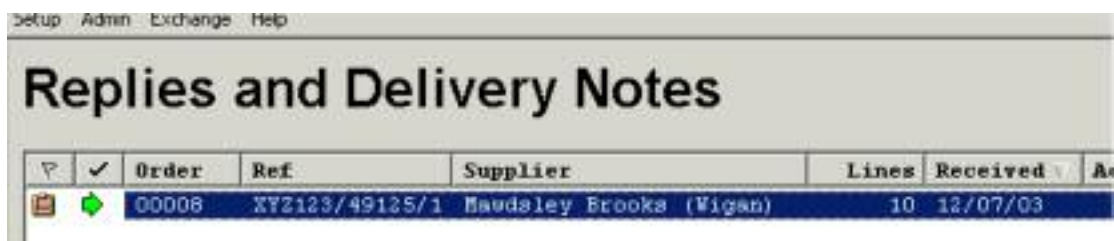
NOTE: any changes made in this mode will over-ride any information contained within the delivery note.

The **Download** button on the Replies and Delivery Notes Screen can also be used at any time to connect to the host system to see if there are any outstanding delivery notes for you collect.



The Delivery Note

After being directed to the Replies and Delivery Notes screen one way or another, a delivery note will be highlighted that corresponds to the order you were previously highlighting. On this screen replies have a loudspeaker icon and delivery notes have a clipboard next to them.



The other columns are self explanatory. The supplier column may, if from Mawdsleys, display the depot the goods are being despatched from (the above 'Wigan' depot is an example and doesn't really exist).

Press **Expand** or double click to open the delivery note and view the contents.

Description	Code	Balance	Expected	Received	ToFollow	Stock
Avocal Ointment 30GM	P001536	10	5	5	5	-2
Bimadyl Allergy Caps 12	P2461812	12	6	6	0	-1
Calcechem Tabs 500PG	P0094005	24	24	24	0	0
Derbac M Liquid 200PL	P0391342	6	0	0	6	0
Evamit 50 Pains Aloe 300PL	P0208953	6	0	0	0	0
Folicare Oral Solution 150PL	P2468627	6	6	6	0	0
Green 2000 120PL	P0402529	6	6	6	0	0
Holl 04423 Guard Skin Bar 300PL	P3055445	4	4	4	0	0
Shadna Drug S.O.C.M.S.O.M	P0371195	25	25	25	0	0
Solen Creme Beach Aloe 20G	P0322951	6	6	6	0	0

This has come directly from the supplier and should mirror exactly what comes through the door. If any picking or delivery errors have occurred and you receive different quantities to those in the received column, simply highlight the offending line and change it to the number of items that actually arrived.

The icon in the left column indicates the received quantity in relation to the quantity ordered; these are:

- All items received
- Part received, none to follow
- Part received, balance to follow
- None received, none to follow
- EDI change overridden by manual input
- Unordered item
- Unable to locate item on original order

The unordered item icon will appear next to any bonus or substitute items on the order.

When complete and all the other received quantities have been checked, press **Accept**. This will update the order the delivery note refers to and the stock levels of the items. Any part 2 orders and transfer orders will be created if necessary.

Reviewing Completed Orders

An extra column has been added for you to help keep track of how stock levels have been changing on your system. Now that Analyst has the capability to receive delivery notes and accept them in without input from any user, this is seen as a valuable auditing facility.

		Description	Code	Ordered	Received
✓	☺	Anacal Ointment 30GM	P0011536	10	10
✗	EDI	Benadryl Allergy Caps 12	P2461812	12	6
✓	☺	Calcichew Tabs 500MG	P0204305	24	24
✓	☺	Derbac H Liquid 200ML	P0391342	6	6
✗	EDI	Erasmic Sh Foam Aloe 300ML	P2828853	6	0
✓	☺	Folicare Oral Solution 150ML	P2468627	6	6
✗	EDI	Grecian 2000 125ML	P0402529	6	12
✓	☺	Holl 04423 Guard Skin Bar...	P7055445	4	4
✓	☺	Inadine Drug 5.0CMX5CM	P0371195	25	25
✓	☺	Solen Creme Bleach Aloe 28G	P2122851	6	6

This column features either a face indicating that the received quantity was changed by a user or an EDI icon indicating that the system used the information contained within the delivery note to accept the order.

This column will not appear if the order relates to a supplier without EDI capabilities or on orders where no adjustment was made to the received quantity.

Electronic Invoices

Only Mawdsleys offer this facility at this time, but below is an example invoice that would be downloaded.

Date	Invoice	Order	Lines	Items
27 Jun 2003	009555	7314	7	0

Code	Qty	Description	Unit	Net	VAT
P0131045	1	Adult Bran Tabs 30		2.03	0
P0471037	1	Diabets Marm Fine 4200 05/06/		1.05	2
P0151001	1	Evets Tabs 12		1.43	0
P0193501	3	Nason Act 1iter 30ML		0.92	0
P0333732	1	Sanatran For E Laxum 5000		6.72	2
P0250209	1	Sandersons Throat Svec 100ML		1.21	0
P0253724	1	Budocrem Cream 80G		1.07	0

VAT ANALYSIS			Goods	Discount	Net Goods	VAT	Total
Code	Goods	VAT	15.98	0.00	15.98	1.48	17.42
0	8.21	1.44					
2	7.77	0.00					

These are presented in alphabetical order and are linked directly to your product file. Click on the description to expand into the product editor.

Creating Reports

Creating and Modifying Reports

All of the standard reports in Analyst are available for you to use as a foundation of your own report, or you could create your own from scratch. The principle for the reports remains the same, whether starting from scratch or not.

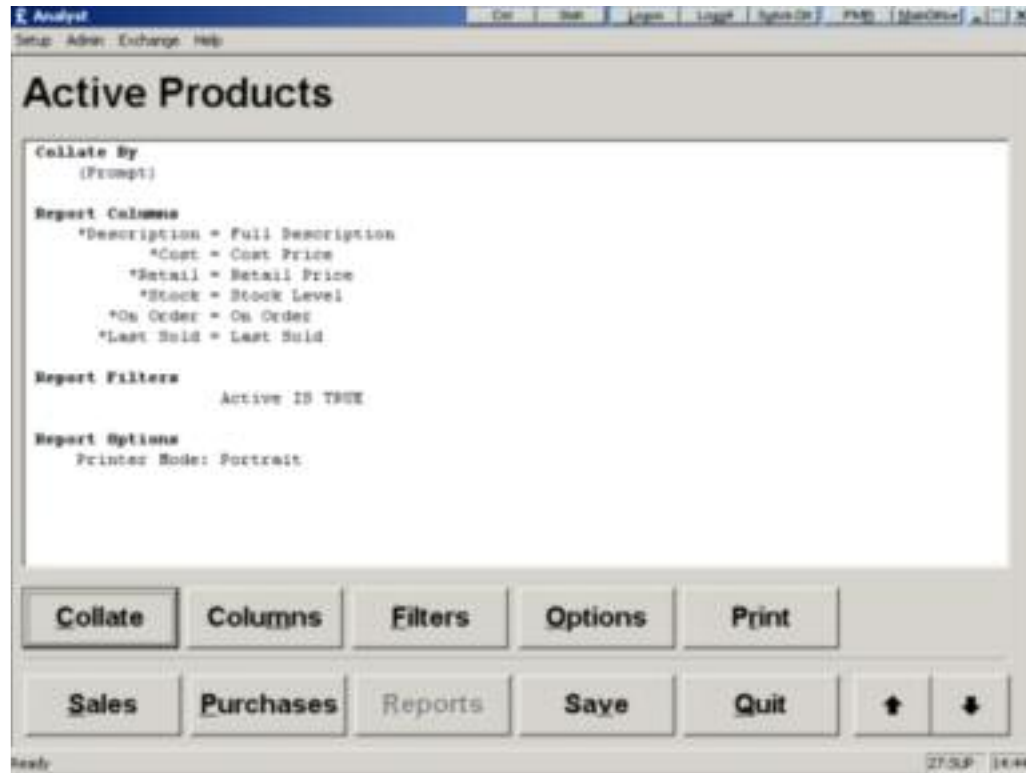
Reports are only currently available on the products held within your system, and although information can be collated by department, supplier and manufacturer etc. there are no reports specifically for them. Certain information can be obtained by running specific till total reports.

The report structure is broken down to three main parts:

Collation	Selecting how to collate the report decides how the report will be grouped. Selecting "Products" will not collate, but display the full results of the report.
Columns	The columns in the report display the information you wish to see.
Filters	The filters on the report determine which items are displayed in the report.

To use an existing report as a base, highlight the report of your choice and press **Edit** alternatively press the **New** button for a blank report.

The report editor screen now appears.



This screen displays the make up of the report. To edit any of the sections press the appropriate button at the bottom.

Collating the Items

By collating the items into groups you obtain a better understanding of the various sections of your business. From the report editor screen press the **Collate** button.

The bottom of the screen will change:



These will set the report collation to be as follows.

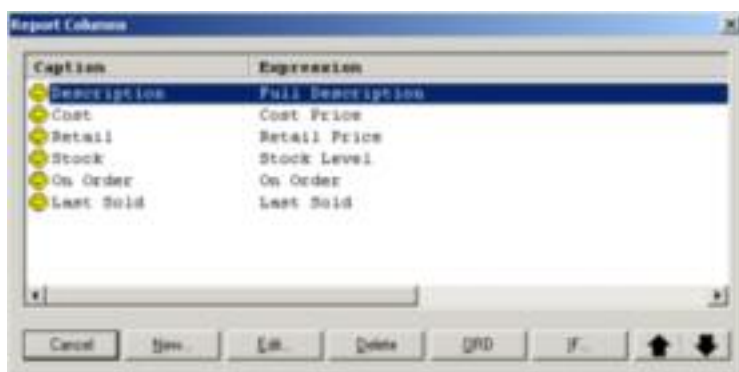
Dept	Department
Group	Product group
Manuf	Manufacturer
Daily	Daily Supplier
Bulk	Bulk Supplier
Family	Drug family
Class	User class
Product	un collated
Cube	Cubic report style
VAT Rate	VAT Rate
Prompt	Prompt this collation screen each time the report is run

By selecting anything except "prompt", the collation can only be changed by re-editing the report in this way.

Columns

The columns in a report displays the information about each item listed in the report. Any number of columns can be added, but naturally too many can make the report too wide to view comfortably and can increase the time it takes to build the report.

To add or edit the columns in the report press the **Columns** button.



This lists the columns that are currently in the report. If this is a new report, only the Full Description column will be displayed. The smiley face indicates that the column will be displayed in the report, columns can be hidden from the report, in which case the smiley face is not displayed.

Adding a new column

Press the **New** button to add a new column.



A blank column window will appear. From the Contents field in the Left Side section, select the field you wish to display. In this example the field "Sales" is selected. The column heading will default to the title of the field chosen, if you prefer something different it can be changed to whatever you type in to the 'Heading' field.

Due to the nature of the field, the date range fields activate. For a simple report displaying the sales over a period, leave the first field to read <Fixed> and select the 'From' and 'To' dates. This would display the number of items sold between and including the dates specified.

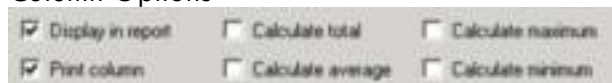
For 'rolling' reports, change the left field which reads <Fixed> to read <Relative>. The dates entered in the adjacent fields will now provide relative results. To create a report that will always show the last 30 days sales select the date 30 days ago in the 'From' field, and select today's date in the 'To' field. This report will always show the sales of the preceding 30 days for each item in the report.

In the same left field, other rolling periods can be selected which are:

- This week
- Previous week
- This month
- Previous month
- This quarter
- Previous quarter

By selecting the appropriate start and end periods, your report can be tailored to your needs. When the date range is correct, press the **OK** button. The column is now added to the list with a summary of the column details.

Column Options



All columns can be omitted from the display of the report on screen or on a printout if desired. This is used mainly to conceal fields used as part of a larger calculation.

Depending on the content of the column, the remaining four options may be available. These are:

- Calculate the total of the column for the section of the report displayed.
- Calculate the mean average of the column for the section of the report displayed.
- Calculate the maximum figure in the column for the section of the report displayed.
- Calculate the minimum figure in the column for the section if the report displayed.

If selected these are calculated as the report is built and displayed at the bottom of the report. In addition, any column which had the total calculated displays on the report summary screen if collated.

Shuffling Columns

In order to present the report in the way you have intended you may need to shuffle the columns around in the report. The columns are displayed left to right as they appear top to bottom in the column summary screen. If you wish to shuffle them up (left) or down (right), highlight the column you wish to move and use the shuffle buttons to position the column correctly.



Advanced Column Definitions

When you have mastered creating normal report columns, there are a number of ways you can manipulate the data by using some of the advanced features below.

Calculation columns

Any of the numerical fields can be entered into a calculation, either with other numbers or with each other. This is achieved by using the 'Right Side' section of the column definition screen after defining the column as usual on the 'left side'.



The operator combo box at the top right allows you to add to, subtract from, multiply and divide the column specified in the left side by selecting the appropriate operator.

The 'right side' contents will then be activated for the calculation to be defined. Any of the fields can be selected from the combo box or a number can be simply typed in. The date range becomes available for appropriate fields.

Other Operators

Below the basic operators lie maximum and average operators based over a day, week or month. These can be used to display the maximum or average figures for the period specified in the 'left side' and can be used for comparison.

Re-using Columns

Calculations can be built up and compounded by re-using columns. Once defined in the report they can be selected as the basis for subsequent columns by scrolling to the top of the 'Contents' combo box, where all columns already defined are marked with an asterisk.

If Columns

If columns are conditional columns. The system will check a condition which is specified and depending on whether that condition is true or false, one of two figures for each item will be presented in the report.

Rather than add a normal column press the **If** button from the column summary window.



As usual type in the heading for the column in the report. The 'Left side' is the field to which each item will be compared. The operator will determine how they should be compared. If this is a text field, like Description, the operator options will be 'Like' and 'Not like', for numerical fields the operator options will be numerical comparisons such as 'equal to', 'greater than or equal to' etc.

In the 'Right side' section select whether the value or text that will be compared will be preset or prompted for when the report is run.

If preset, type in the value / text to be compared. If the field chosen in 'left side' is another table in the database such as department or supplier, the list will appear in the window of this screen. These can be selected by clicking them. Multiple selections can be made by using the Shift and CTRL buttons.

If the text or value is to be prompted for when the report is run, type in the question that you wish to appear.

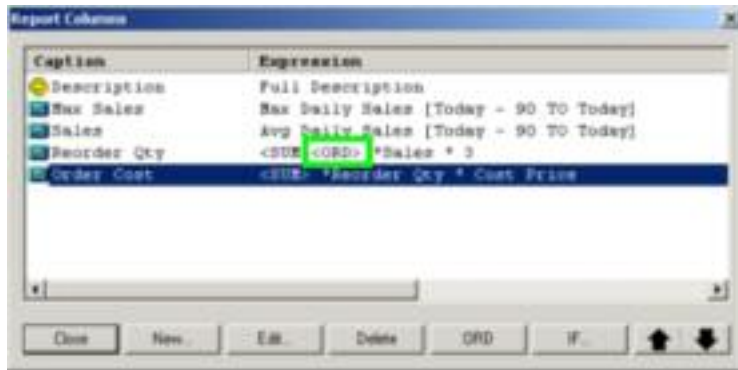
Now the condition has been set all that remains are to select the fields that will provide the data to be inserted into the report. From the combo box, select the 'True result' and 'False result' fields from the combo boxes. Columns you have already defined appear at the top of the list.

If the condition is met the result is true; if not, the result is false.

Ordering Columns

When creating an report to order from, there will probably be several columns in the report not just the re-order quantity you have calculated. By using the **ORD** button on the column summary screen you can designate which column the system will take as the re-

order quantity. Highlight the column you wish to use to re-order and press the **ORD** button. This will insert the text '<ORD>' into the column definition.



Filters

Report filters limit the number items that a report will display. Without a filter a report will scan through the entire database on your system and present all of the items for you to view. This is usually impractical as larger databases can hold over 100,000 items.

By imposing a filter though, we can restrict the number of lines that appear on a report to only those that we are interested in.

To add a filter press the **Filters** button from the report editor screen. The filter summary window then appears.



On new reports this is empty by default. If this is an existing report the filter summary is displayed.

When defining the filter it is important to remember that the filter determines which items the report will show, not which items will be excluded. Comprehensive filters are built up by a number of different lines which each only allows a number of lines onto the report.

In the following example a filter will be added to show only active items which have sold in the specified period.

To add the first line to the filter press the **New** button.



The filter definition window will appear. In the 'Left side' field, drop down the combo box and select the field 'Active'. Ensure the operator is set to 'Is' and the 'Right side' is set to 'True'. Press **OK** when this is the case and the filter summary screen will return displaying "Active IS TRUE"



To add the second line to exclude zero sale items from the report press the **And** button. Drop down the 'Left side' combo box and select the '*Sales' field. The * (asterisk) denotes that this is the column that has been defined in the report. Select the operator 'Greater Than'. In the 'Right side' section another field can be specified which can be useful for certain reports, for this example though over type the 'Preset' field with 0 (zero) and press **OK**.



The filter summary screen returns and now displays the filter "Active IS TRUE AND *Sales GT 0"



Press **Close** on the summary screen to return to the report editor screen.

Report Options

Within the options of the reports setup are two printing options.



The option on the top left determines the orientation of the report on the paper. A portrait setting allows more lines to fit on each page, but as it is not a wide the size of the text will be squeezed and made smaller so all of the information can fit on. Setting the paper to Landscape provides more room for wide reports to fit on and remain legible but as it is now shorter fewer lines will fit on the page and so more sheets will be used.

The option on the bottom left determines whether the full description is truncated in the same way as determined in the system configuration of if this reports has a different rule. If this report should follow the default setup select the (Use default) option, otherwise select the most appropriate for your needs. The Truncating Long Descriptions topic explains what the options are.

By using the options on the right you can set how the figures will be cleared if you want to create your own Shelf Filing List. The top option will not clear the shelf filling figures, the second will use the mode selected in the Options Tab of the PoS System Configuration, the third and fourth options override the system configuration and either provide a prompt to clear the figures or will clear them without prompting.

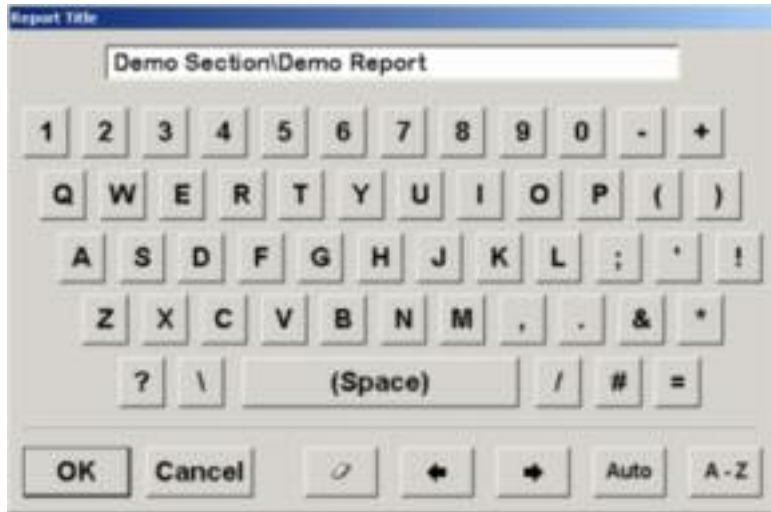
Saving Reports

After a report has been created or modified it must be saved. Press the **Save** button on the report editor screen when you editing is complete.

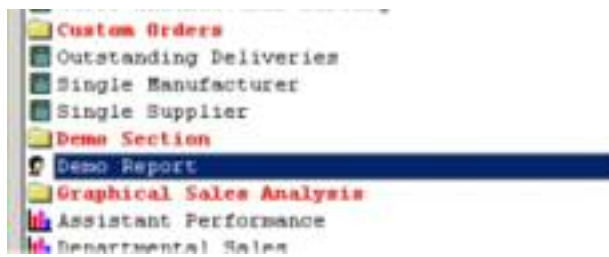
An on-screen keyboard will appear for a report title to be entered. This must differ from the standard reports supplied with the system as they cannot be overwritten. Type in the title of the report and press **OK**. The report list is now displayed with your report highlighted.

Organising Reports

The standard reports are separated into groups headed by red titles. These can be added to easily when the report is saved. Type in the name of the section you would like the report to appear in, or the name of the new section you would like to create followed by a \ (backslash) then the report name.



The section is inserted alphabetically into the report list.



Training

Training is one of the most important aspects of owning an IT system of any kind. Analyst is designed to save you time and empower you with information you can use. Without a proper understanding of the system or the skills to use it you will struggle to make the system to work for you.

As part of your installation you will receive initial training to enable the new system to be used straight away. We will only train you on the basics which will allow the system to perform the basic functions of selling items, printing labels and sending orders. When you are confident with the basic skills of the system we will return and build on the initial session, tailoring each visit to your specific requirements.

As part of our on-going commitment for you to use the system to its full, as part of your SureCover you are entitled to an extra half day session with one of our trainers each year. This can be used for:

- Refresher training
- Learn new features
- Go through the year's developments of the system
- Use us to train new members of staff
- Question and answer session
- Show us how you use the system and let us suggest shortcuts and alternative methods.

To experiment with the systems settings and features switch into the Training Mode and be confident that the changes you make will have no repercussions on the live system. This section explains the Training Mode and its various options.

Training Mode

Training mode in Analyst allows one or more terminals in the system to use a separate database to the live system to enable you to make sales, dispense medication, create orders and experiment with new features without affecting any of the sales, stock or any other information in your live system.

There are two types of database you can use during training: either a sample database with products, customers/patients already on the system or a reduced version of your own database

To enter the Training Mode go to the terminal you wish to use and select **Admin** and **Training Mode**.



The system confirms that you are about to enter the Training Mode. As the 'tip' suggests, your training database can be rebuilt by holding down the SHIFT key whilst clicking yes which will launch the Training Mode Setup Wizard. This might be necessary if the existing training database is an old version, you wish to undo any of the changes you have made to it or you wish to switch between a sample database and your own.

If you have already run through the wizard and have setup a database to use Analyst will restart in Training Mode.



A warning appears to remind you that you are in Training Mode and the display includes the warning in the top right of the screen.

Whilst in this mode Analyst will perform as a live system, even interacting with other terminals in the system in Training Mode. However, so real customers cannot be served or dispensed to by mistake, the Customer display and PMR labels are marked "Training Mode". Also for your security the cash drawer will not fire open.

Returning to Live Mode

When you have finished with your training session you will need to return to live mode to allow customers to be served. This can be done by selecting **Admin** and **Exit Training Mode**, or by closing Analyst and re-launching it.

Don't forget that any sales, orders, reports, promotions etc. will not be carried over to the live database. If you wish to implement something you have just learned in Training Mode, you will need to set it up again on the live system.

Training Mode Setup Wizard

In order to make the training more realistic the database used is created from either your live data or sample data, but in either case is up-to-date. The first time you invoke the Training Mode the Setup Wizard will launch automatically. Subsequently you can launch the Setup Wizard by holding the SHIFT button while clicking **Yes** on the Training Mode confirmation window. By creating a new training database you will replace the old database with an up-to-date version of data and will wipe any experiments you have been trying.



The opening Setup Wizard screen briefly explains the training mode. Click on **Next** to continue.



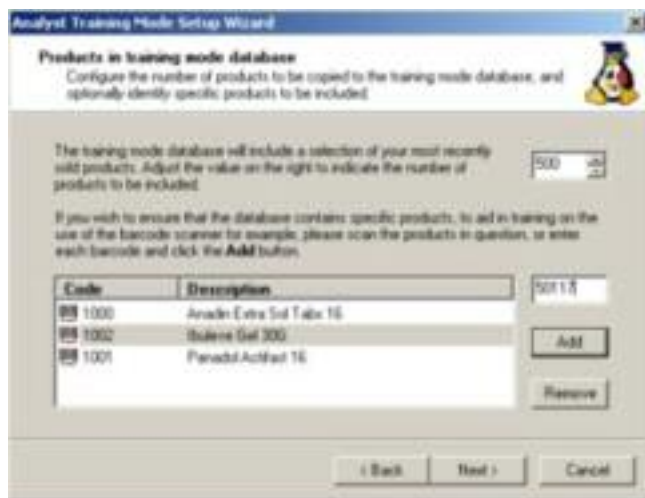
The second screen presents a choice of database to create. Systems which have been active for a while will benefit from using the live database the source of training data. New systems with little history would benefit more from using a sample database complete with products, customers and recent sales and dispensing history.

Using a Live Database

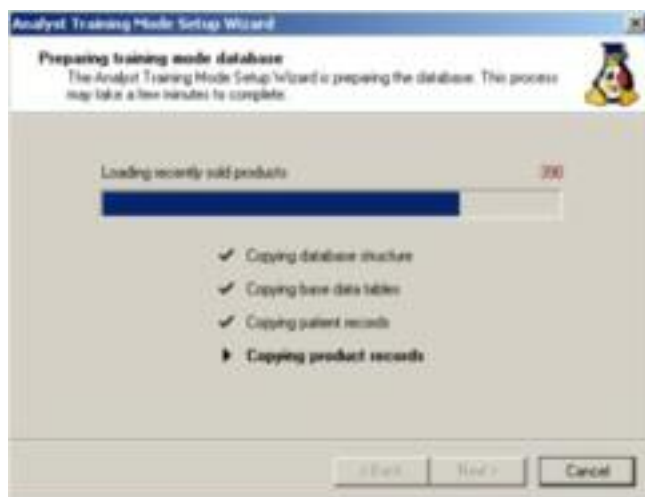
Using a sample of your live database provides the obvious advantages that you will be familiar with the data it contains as the Setup Wizard will copy you live database but

trim down the number of products which are included and include only the last 90 day's worth of sales and dispensing activity. Select the Live Database option and Press **Next** to proceed through the Setup Wizard.

This screen determines how many products will be included in the training database. Reducing the number of products keeps the size of the database down and increases the speed of building orders, running reports, searching the database etc. and will generally help the training experience. The Setup Wizard will select 500 of the most recently sold/dispensed items but that can be changed if required. Specific items can be included by typing or scanning the barcode into the field on the right of the bottom pane and by pressing the **Add** button. This is especially useful to use items near to the training terminal or those items you would like to experiment with. Items to be specifically included are displayed in the bottom pane and can be removed by highlighting the item and pressing the **Remove** button.



When you have specified the number of items to be included and included any specific lines to use press the **Next** button to build the database.



The database will take a couple of minutes to build during which time various progress bars appear to keep you informed and the four main aspects of creating the database are ticked off.



When complete press **Finish** to launch Analyst in Training Mode.

Using a Sample Database

The sample database provides the opportunity for new users to have the benefit of manipulating sales data and using customers and patients that are already setup. The sample data contains roughly 1500 products and 1000 customers/patients taken from a real system and anonymised. Select the Sample Database option and Press **Next** to proceed through the Setup Wizard.



The training database will now build by copying the current structure, importing the training data, personalising and updating the data to relate to the last 90 days to allow reports and orders to be built. When complete press **Finish** to launch Analyst Training Mode.



Feature List

Analyst is quite 'feature rich' and some can help you use the system more effectively or set your shop apart from your competitors. Below is a list of features which you may want to spend time looking at if you haven't already.

This is not an exhaustive list and is in no particular order

Analyst General

- Re-Order Methods
- Merging Orders
- Scheduled Order Transmission
- Automated Replies Processing
- EDI
- Audit Trail
- Tagging Report Lines
- Templating
- Morphing
- Creating and Modifying Reports
- Backing Up Analyst
- Assistant Time and Attendance
- Task Reminders

Analyst PoS

- Discounting Lines
- Cashback
- Banking
- Cash Declaration
- Product Messages
- Stock Dumps
- Printing Labels Following Updates
- Promotions
- Future Price Changes
- Loyalty Schemes
- VAT Exemptions
- Time Zone Pricing
- Currencies

Security

Analyst Security

The power and flexibility of Analyst is available to all if the appropriate levels of security are not implemented correctly on the system, and as much as you may like and trust the staff that surround you in your store, abuse of the system can occur. In 2003 the British Retail Consortium revealed that British stores lost a total of £426 million to theft by shop staff* and in 1999 the Centre for Retail Research estimated that staff theft accounted for 50.8% of all thefts from stores*.

The main methods of staff theft are:

- Cash theft from till
- Stock theft
- Inappropriate discounting of items to friends, family and colleagues ('Sweethearting')

The security methods in Analyst are there to protect the owner of the business from theft and the honest and descent members of staff from those who are less so. By properly implementing the systems available in Analyst you will introduce an effective deterrent to the would-be thief and an investigative tool to help catch those responsible for jeopardising your profitability.

Assistant Logon

By requiring each assistant using the system to logon each time they need to use the till, Analyst builds and retains a record of the activities for each member of staff. These activities themselves can be restricted from use by certain members of staff by limiting the number and type of features and functions available to them using the assistant permissions. A Privilege Level can also be assigned to each assistant to grant or deny them the use of features such as unusual payment methods and uncoded buttons.

Sales Alerts

The system can draw your attention to potentially suspicious sales by placing an exclamation mark on the Previous Sales screen next to sales where certain actions have occurred.

Cash Declaration

This procedure during the cashing-up routine forces the staff to count the contents of the cash drawer before the value in the system is known. This alleviates the problem of staff taking the excess cash if the drawer is found to be 'up'.

Reports

Use the reports provided to keep your finger on the pulse of the business. But importantly restrict access to reports to only those members of staff who need to see the contents. Read the Report Security section. Use the Audit Trail to monitor errors, tills or assistants. Use the Time of Day Analysis to help you gauge typical performance of your store so you know how much cash you expect to find in the drawer.

Stock Takes

Frequent stock takes highlight any problem areas in the stock control of your shop. This may not all be down to theft, but tracking theft will be difficult unless other stock problems such as order input and wastage are remedied. Use the Suggested Stock Counts and Rolling Stock Counts to break stock counting into manageable chunks and make it part of your daily/weekly routine. Keep the closest eye on high value and fast moving lines as they are most desirable/popular by their nature. Try to avoid the same member of staff counting the same section every time. This helps avoid false figures continually being entered as part of a cover-up.

Analyst Event Monitor

This add on module for Analyst listens for events happening around the system and logs when and where they happen and who was logged on at the time. Event Monitor can use a webcam to capture footage, interface with network cameras, activate your building's burglar alarm, monitored or otherwise and even send you a text message with the details of the event.

* Source : <http://www.startups.co.uk/YdJl4dNojdegVw.html>

Security Tips

The system alone cannot guarantee that you will not be the victim of theft, but by using some of the ideas below will help reduce the temptation to staff and customer alike.

- Insist that refunds and discounts are authorised by a more senior member of staff.
- Do not permit assistants to award themselves their staff discount. Have another assistant serve them and possibly even have it counter-checked.
- Remove large amounts of cash from the drawer to the safe or Counter Cache. The Banking feature keeps track of this to keep cashing-up simple. You only really need to keep a few notes to give out as change.
- Cash up more than once per day, ideally at shift changes. Discrepancies are picked up faster and help pinpoint errors or thefts.
- Limit the number of staff allowed to use till.
- Buy an extra cash drawer insert and prepare an extra float. This allows the full cash drawer to be counted in the back of the shop out of sight customers whilst the till continues with the replacement drawer.
- Scan the through the Audit Trail for the day to pick up any glaring anomalies.
- Use the Time of Day Analysis report to gauge your average takings per month, week, day or even hour. If you seem just as busy but your takings slide, is a particular day/shift suffering?
- Use the Assistant Performance report to gauge the performance of assistants over time.

- Restrict access to the Reports and Till totals sections. Seeing the how much money the business is taking can help thieves justify taking a little.
- Use the Assistant Totals section of the Till Totals to work out averages for the takings of assistants. Do their takings stack up to the amount of time they spend at the till? Refunds, discounts and payouts are also in this section.
- Use the Assistant Activity section of the Till Totals to monitor the number of sales, voids, layaways, price overs, clears.
- Introduce a No Sale Reason for each eventuality and monitor the use of them. Have the staff explain if they then need to use the 'Open Drawer' option.
- Avoid pricing goods at exactly £1 or values which the customer might tender exactly, or values which are easily added. This can encourage 'skimming' where the customer tenders the exact change for their goods and the assistant need not scan then items to add them up, nor open the cash drawer to open the cash. Prices of 99p, 79p etc are awkward to add and encourage the customer to wait for change to be given from the till.
- Encourage credit/debit card sales. Handling less cash means there is less to steal and missing amounts are more easily spotted.
- Be aware of assistants serving their friends and family or frequent visits by the same customer to the same till/assistant. Up to 16% of customer theft has been attributed to collusion between staff and customers. 'Sweethearting' involves staff applying discounts, changing prices, ringing similar but cheaper items through or simply 'skimming' items; not scanning them at all. This is considered 'safer' than outright theft as the staff aren't caught with the goods and the system might be blamed for the error.
- Pharmacies carry most of the top items on a shop lifter's 'hit list'. Razor blades, batteries, condoms, pregnancy tests, cosmetics, vitamins, branded toiletries such as Olay and Lynx, electric toothbrushes and Braun gas cartridges are among the most common items stolen in the UK.
- Consider your floor plan and field of view. Where possible keep high value items behind the counter.
- Be overt with your security. Displaying to staff that you aware of what goes on within your business and it is likely that you will spot anomalies will deter the would-be thief. Spying and other covert activities can be demoralising to staff and may even be illegal.

Panic Button

The security measures in Analyst are not just to protect against theft. A 'Panic' button can be found on the status bar at the bottom of the screen or in the Caption bar at the top of the screen (depending on your configuration) which can be used to discretely alert other staff in the shop about a problem on a terminal through the Analyst system.



If you have cause to use the Panic button press the button on screen or press **CTRL+SHIFT+N**. Depending on the system configuration, you may need to hold the CTRL button on the keyboard whilst pressing the screen. This helps reduce accidental triggers which may be important if the Panic button is 'wired' directly into your alarm through Analyst Event Monitor.



The message that appears on every other terminal details which terminal has triggered the panic button and who is logged on there. The message must be dismissed by pressing **OK** before continuing in Analyst.

Panic Button Options

System Configuration options on the Options Tab control where this button lies on the screen, if at all, and how it is triggered.



Require CTRL key to confirm panic situation	Requires CTRL on keyboard to be held down whilst pressing Panic button to again reduce the chance of an accidental trigger.
Notify other users when Panic button pressed	Causes an alert to appear on all other terminals when the Panic button is pressed. Turn this off if Event Monitor alone is to be alerted.
No Panic Button	Removes the Panic button altogether and disables the feature.
Caption bar at top of screen	Places the Panic button between the Shift and Logon buttons in the caption bar at the top of the screen.
Status bar at foot of screen	Places the Panic button at the bottom right of the screen next to the assistant initials and time.

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